

THE
Social Work FORUM



VOLUMES 40 / 41 2007 / 2008

YESHIVA UNIVERSITY

WURZWEILER SCHOOL OF SOCIAL WORK



THE

Social Work FORUM



VOLUMES 40 / 41 2007 / 2008

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From the Editors

Jewish philanthropy, Jewish education, and self-disclosure of mental illness: three very distinct topics, all intrinsic to the social work enterprise. We are pleased to offer these three themes in this double issue.

In the first section, we are privileged to present an essay by Jack Wertheimer, “Linking the Silos: How to Accelerate the Momentum in Jewish Education Today.” The essay was originally published by the AVI CHAI Foundation in 2005. Wertheimer is one of the leading authorities on contemporary Jewish life and the issue of “Linking the Silos” has become a major topic being addressed by Jewish communal organizations in terms of internal operations and inter-organizational collaboration.

In the second section, we are treated to a group of papers from The Professional Leadership Summit held in Miami, Florida April 29–May 2, 2007. That Summit was convened by United Jewish Communities (UJC), which represents and serves 155 Jewish federations and 400 independent Jewish communities across North America. UJC and the Federations of North America represent one of the world's largest and most effective networks of social service providers and programs. That conference brought together 400 leading professionals from 98 Jewish federations to tackle the strategic issues facing the federation movement. The Summit, held for the first time and titled “Creating the Architecture for Change,” convened the federation's professional leadership in an intensive series of seminars, work groups, and discussions to foster new ideas for building a continental federation system for the 21st century.

Five papers were selected for the Forum, addressing some of the most important issues confronting the federation movement and the 21st-century North American Jewish community overall. Indeed, the Jewish community finds itself in an ironic position. The community is experiencing unprecedented personal and group freedom as well as economic and political success. Simultaneously, the community is confronting significant challenges related to assimilation, engagement of the next generation, fundraising trends, and external threats from anti-Semitism and terrorism. These patterns are combined with declines in the num-

ber of Jews, brought about by high rates of intermarriage and low birth rates. The philanthropic landscape is shifting, and the ever-expanding needs of the Jewish people present new challenges for resource development. The donor profile is changing, with more competition, a growing demand for designated giving, and greater donor involvement in their philanthropy. The enormous growth of private foundations has important implications for communal funding and decision-making.

Thoughtfully applying Collins' model of "Good to Great," Freedman, Herstig, Robin, Smolarz, and Stern ask, "Should Federations Become More Like Businesses?" In "Meeting Them Where They're At: Redux," Horwitz and Milens discuss engaging the next generation of philanthropic leaders and donors. In a wide-ranging and deep analysis, Jennifer Rosenberg tackles the "Major Threats and Opportunities for the Federation Agenda: Demographic and Social Welfare Trends of Consequence." Addressing some of the shifts in resource development noted above, Jim Rosenberg uses the literature to look at a new approach of "Extreme FRD: Taking Financial Resource Development to the Edge and the 'Long Tail' of Opportunity." Finally, LeVine offers a new view toward organizational leadership and change. Her paper examines short- and long-term policy and human resource development needs in "Exercising Leadership for Systemic Change."

In the final segment of this issue of the Forum, we are fortunate to be able to include a very incisive and courageous paper by Ruth C. White, entitled "Instructor Disclosure of Mental Illness in the Social Work Classroom." She argues effectively that the act of disclosure de-stigmatizes mental illness, adds diversity to programs, provides role models for mentally ill students, exposes all students to this critical social work concern, and offers pedagogical value for the classroom.

The structure and content of this issue promise to be a bit different and unique and will delve into new areas of intellectual and practice interest. We trust our readers will gain much from the writings and musings of the authors.

Eric Levine
Daniel Pollack

Linking the Silos: How to Accelerate the Momentum in Jewish Education Today

Jack Wertheimer

(Editors' note: The Social Work Forum is privileged to include the following essay. It is excerpted from Jack Wertheimer's "Linking the Silos: How to Accelerate the Momentum in Jewish Education Today," published by the AVI CHAI Foundation (2005). The complete report is available at www.avichai.org. The larger study upon which this report is based appeared as Jack Wertheimer, ed., "Family Matters: Jewish Education in an Age of Choice," published by Brandeis University Press and University Press of New England (2007).

Executive Summary

Observers of American Jewry have noted the seismic shift during the 1980s away from communal policies mainly designed to foster Jewish integration and toward a survivalist agenda. Communal leaders became less preoccupied with fostering the socio-economic advancement of Jews, and instead set themselves a new challenge: How do we help Jews maintain a strong connection to Jewish life?

The urgency of the new question was powerfully demonstrated by disturbing findings in the 1990 National Jewish Population Study (NJPS), particularly concerning spiraling rates of intermarriage and declining levels of identification among younger Jews. In response to those alarming trends, communal leaders and funders focused even more sharply on questions of Jewish identity during the 1990s. Many federations established "continuity commissions" to strengthen local programs connected to Jewish identity-formation, funders conceived of a series of new initiatives to strengthen Jewish education, and various agencies devised programs to reach underserved populations and Jews at risk.

As many of these new initiatives have been in place for over a decade and more, thought is given to the next steps needed to strengthen Jewish identification, and the time is ripe for a reappraisal of the current moment in Jewish education. Certainly, one way to think of such a reassessment is to examine the actual learn-

ing process. How well are educational institutions doing? How effective are curricula, pedagogy, and educators? Have we improved upon teacher recruitment and retention?

The current study has taken a different tack by examining the broader Jewish environment in which Jewish schools and educational programs function. The project therefore began with a series of questions about the recruitment of learners and the effects of Jewish education, in order to comprehend what inspires Jews to enter the portals of Jewish education, the short-term impact of their engagement, and the long-term effects of Jewish education upon their lives afterward. By addressing these matters, we hope to situate the field of Jewish education within its larger familial, social, and communal contexts.

With regard to decision-making, we asked: How do Jewish parents choose Jewish education for their children and themselves? What is on their minds when they make such decisions? And what kinds of language do they employ when they talk about Jewish education? What are some of the key variables of social differentiation that affect educational choices—such as denomination, gender, affluence, generation, community, and marital status? What are the factors that complicate the recruitment of learners for Jewish education?

Concerning the impact of Jewish education, we asked: To what extent is the family affected when a child is enrolled in a Jewish educational program? Conversely, what happens when children are withdrawn from such programs? Do different forms of education have specific effects on particular types of adult Jewish engagement? Are parents who participated in particular educational activities more likely to enroll their own children in those same activities? What, in short, are the cumulative impacts of various types of Jewish education?

These and other evolving questions were posed by a team of seven researchers who employed both quantitative and qualitative methods to arrive at some answers—i.e., the team built upon survey data and intensive interviewing. Members of the team were drawn from a variety of disciplines, ranging from sociology to education, from history to anthropology and social psychology. The study was built upon fresh analyses of the National Jewish Population Study of 2000–01 and a specially designed new survey

of parents who are members of Jewish Community Centers (JCCs) in five localities. Simultaneously, five researchers conducted interviews in a variety of communities. Collectively, the research team intensively gathered data in ten localities across the United States. The team then analyzed the intersection of families, learners, various educational programs, and the communities in which they are situated.

Our research has led us to challenge a number of widely held assumptions about Jewish education—that a single type of institution will meet the diverse educational needs and preferences of all Jewish families; that schools are exclusively educators of children; that outside of the Orthodox world, denominational identification is a matter of little importance; that efficiency is the best way to strengthen Jewish education and duplication is a wasteful misuse of precious resources; that only the family determines whether Jewish education will succeed. Instead, we found that:

- a cluster of educational experiences can powerfully reinforce Jewish identification.
- the availability of educational choices is of great importance to parents.
- adults and their children mutually reinforce each other's Jewish engagements.
- schools play many roles.
- adherents of the various denominations make different educational decisions.
- social and communal contexts can have a major impact on whether Jewish education succeeds.

These findings underscore the need to think and talk about Jewish education in new ways. Jewish schools and settings for informal Jewish education do not work in isolation. Education is not a separate sphere of Jewish life; it is integral to how many American Jewish families live today—in marked contrast to how Jewish education was experienced a generation, let alone two generations, ago. Overlapping circles of learners, parents, members of extended families, synagogue congregants, peer groups, educators, and communal leaders interact in the activities of Jewish education. This means that beyond the cognitive knowledge and the skills they teach, Jewish educational settings are central to the way American Jews construct their lives and communities today.

Precisely because of these important interconnections in the actual lives of average Jews, leaders concerned with Jewish education must find ways to build institutional linkages between various formal and informal educational programs, between families and schools, between educators in various venues, and between the key communal agencies engaged in support of Jewish education. The field of Jewish education is currently based on a loose, barely connected network of autonomous educating institutions. Each operates as a silo—a term employed by the information technology industry to characterize the unidimensional manner in which institutions and fields of knowledge operate in isolation, as vertically organized operations, divorced from constructive, horizontal interaction with others. The current challenge in the field of Jewish education is to link the silos, to build cooperation across institutional lines and thereby enable learners to benefit from mutually reinforcing educational experiences, and to help families negotiate their way through the rich array of educational options created over the past decade and longer.

Introduction

Jewish education in the United States has developed in new and surprising directions. The infrastructure of educational programs, both formal and informal, in quite a few communities has attained a new level of maturity and offers children and their parents a range of attractive options.

Families, for their part, relate to educational institutions in far different ways than did Jewish parents of school-age children several decades ago. Together, these shifts require us to rethink our understanding of how Jewish education works—and ought to work.

Education is not a separate sphere of Jewish life; it is integral to how American Jews live today, in marked contrast to the way Jewish education was experienced a generation, let alone two generations ago. Overlapping circles of learners, parents, members of extended families, fellow synagogue congregants, peer groups, educators, and communal leaders all interact with one another in the activities of Jewish education. This means that beyond the cognitive knowledge and the skills they teach, Jewish educational settings are central to the way American Jews construct their lives and communities today.

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The Current Moment in Jewish Education

American Jewish life has shifted dramatically over the past 25 years, to say nothing of the last half-century. Herberg's classic analysis in "Protestant-Catholic-Jew" no longer applies to current conditions, not only because of a change in the size and fortunes of different religious groupings but also because Americans conceive of religious identification differently in our own time.

Americans also do not relate to one another, let alone participate in civic culture, as they did in the postwar era. Any analysis of American Jewish life, particularly concerning issues of identity and transmitting Judaism and Jewish culture, must be grounded in an understanding of the American environment, because Jews have not only acculturated to it but have helped to create it. We were particularly struck by the great importance that parents placed on their right and responsibility to make choices for children. This single-minded focus on choice reveals Jews as self-conscious consumers of education and religious experiences, and it renders Jewish education quite a different enterprise than it was 50 years ago.

Even though it is widely understood that the ground rules have shifted, thinking in the Jewish community has not necessar-

ily absorbed this reality into our conceptions of Jewish life, let alone into the field of Jewish education. New circumstances now shape the field of Jewish education:

- Mid-20th century sociological studies by researchers such as Sklare and Greenblum portrayed an environment where a vast population of parents came to the suburbs and enrolled their children in the nearest synagogue supplementary school. Few other Jewish educational options were available to them, particularly in the suburbs. Over the past half-century, communities have developed multiple options. Day schools of various stripes are available, as are Jewish early childhood programs; teens have the opportunity to participate in youth groups, travel to Israel, and attend overnight camps. The field of Jewish education has expanded quite dramatically in recent decades, a development worthy of celebration and deserving of further encouragement.
- Families think about Jewish education differently today. Neighbors, friends, and relatives play a far smaller role than they had in the past in placing pressure upon families to provide a Jewish education for children. As the Jewish population decreasingly lives in “Jewish neighborhoods,” as the incidence of intermarriage rises, and as religious affiliation is far more diverse, external forces have come to play a declining role in their decisions. Today, parents are choosing Jewish education and are actively involved in ensuring the best possible fit between each child and the school they select. They do not hesitate to enroll each child in a different school, provided that the fit is right for the child.
- A few decades ago, observers of the Jewish community lamented the “pediatric Judaism” promoted by synagogues. Congregational programming tended to focus on the needs of children in the years before Bar and Bat Mitzvah. Today, we think about Jewish education as an enterprise for Jews of all ages. Family education programs seek to involve parents in their children’s schooling. But even this is giving way to more sustained and robust adult education curricula. Proportionately, far more parents are engaged in serious Jewish study than was the case 50 years ago.
- Parents also feel a greater sense of responsibility to reinforce

Jewish education than was the case in the past. When Marshall Sklare interviewed parents in “Lakeville,” he heard from many that the purpose of synagogue membership is to have a place to drop off the children for their religious schooling. Parents proudly announced their intention to avoid setting foot in the building. Today’s parents speak a very different language. Some are motivated by a sense of empowerment—i.e., they will not cede their parental responsibility to supervise every aspect of their children’s lives. Others, however, candidly declare their embarrassment when they cannot answer their children’s questions—and they seek answers by engaging with the school and with Jewish education for themselves.

- Teen education is receiving far more attention—and funding—today. Whereas the Bar/Bat Mitzvah was viewed as the culmination of Jewish education, educators today are developing creative programs to keep young people in Jewish educational environments throughout their teen years.
- Today’s educators also appreciate the need for a mix of educational formats—the formal and the informal, the cognitive and skill building coupled with the affective forms of Jewish education. We are far more aware today of the need for clusters of Jewish educational exposures, rather than formal schooling alone.

A More Perfect Union: Families and Jewish Education

Today, Jewish families and educational programs do not operate in two separate spheres but rather mutually reinforce one another. Clearly, family engagement with Jewish education ranges across a spectrum from more to less intense participation, but it is no longer helpful to look at families as divorced from the Jewish educational process, no more than it is useful to imagine schools and informal education as operating independently of families. Instead, there are multiple points of intersection between learners, their families, and Jewish educational settings.

The Effects of Parents’ Jewish Education upon Their Educational Choices for Their Children

To illustrate this mutual reinforcement process, we begin with the ways in which the Jewish education and informal experiences of parents affect their children’s Jewish educational participation.

This operates in two distinct ways. Firstly, parents who themselves had received a more extensive Jewish education tend to enroll their own children in a broader range of Jewish educational settings than do parents who have not had those experiences. And secondly, in many families, the particular educational experiences of parents repeat themselves in the next generation.

When we array the Jewish schooling of parents on a continuum from less to more intensive experiences in their own childhood and adolescent years, we find increased utilization of all forms of Jewish education—formal schooling and informal educational programs—among the children whose parents were educated more intensively, a pattern that is especially dramatic among parents who attended day schools for seven years or more.

Particularly noteworthy in this regard is the strong relationship between a parent having attended day school and his or her children's enrollment in a day school. Over 90% of parents who attended day schools through high school enrolled their own children in day schools, and 40% of parents who attended day school through 6th grade enrolled their own children in day schools. (We may surmise that when both parents had intensive Jewish educational experiences, these figures are even higher.) Parents who attended day schools were also most apt to send their children to programs of informal Jewish education, such as summer camps, youth groups, and trips to Israel.

At the other end of the spectrum, parents who attended one-day-a-week Sunday schools were far less likely to enroll their children in intensive Jewish education or in programs of informal Jewish education. And in the middle of the spectrum, parents who had attended supplementary schooling beyond the Bar and Bat Mitzvah year tended to enroll their children in more programs of Jewish education than those who did not continue their education. While other factors, such as denomination, play an important role in these decisions, the educational experiences of parents significantly shape their aspirations for their children.

Similar patterns are evident when we examine the exposure of parents to various forms of informal Jewish education. Those parents who participated in Jewish summer camps, youth movements, and Israel trips are more likely to enroll their children in such programs.

The Jewish Identifications of Grandparents Play a Role in the Jewish Educational Opportunities Provided to Their Grandchildren

Based on the reports of respondents who are parents when asked about their parents and also the Jewish education they gave their own children, we can synthetically reconstruct relationships over three generations. Respondents to the National Jewish Population Study (2000–01) were asked Jewish identity questions about themselves at the time of the survey, about their childhood, and about their children's Jewish education. In effect, they were asked about three generations who could be labeled as the grandparents (those who shaped their Jewish homes when they were children, some 30–40 years ago), the parents (or respondents), and their children.

By drawing upon the small number of questions that portray the Jewish engagement of the grandparents during the years when the parent generation was growing up, we can examine the impact of grandparents' Jewish engagement upon the Jewish education of the respondents' children—in other words, the grandchildren. The effects are quite strong. When the grandparents' Jewish engagements are arranged in four categories of intensity, ranging from "very low" to "high," the more intense the grandparents' observance of Judaism, the higher the percentage of grandchildren who attend a Jewish early childhood program (with slightly over a quarter of grandchildren attending a preschool whose grandparents had a "very low" measurement of their observance, compared to over 60% of children enrolled whose grandparents scored "high" in observance). The same pattern obtains for day school attendance, enrollment in a Jewish day camp, youth group involvement, trips to Israel, and current enrollment in formal Jewish education. (For reasons that are not clear, the only exception to this pattern comes when we examine Jewish overnight camping.) These findings testify to the enduring effects of Jewish socialization from one generation to the next—and then to the following generation.

Parents Regard Themselves as Agents of Jewish Education

Parents see themselves as the primary agents of Jewish developmental influence. They discuss their family rituals as setting norms for, and sending messages to, their children. Here is how one couple in a Southern city, who enrolled their children in a Conservative synagogue's supplementary school, put it:

Father: *"Children learn from parents and by what parents do more than what parents say... You've got to teach by example...I don't mean you've got to stand up there every Saturday and preach to them and yell the words at them. In my opinion, it's more of a daily example of doing."*

Mother: *"And I would agree with that.... When they see us light the candles and do the blessings at Shabbat or go to services a couple of times a month, or...participate in the holidays...they're learning...by example to do that as well one day."*

Parents also self-consciously understand the importance of their own roles as models of engagement when they discuss their community involvement, volunteering, synagogue leadership and activity, and other Jewish pursuits outside of the home. Some parents talk about their efforts to structure various Jewish activities for their children as a component of modeling. That is, they discuss the decision to send their child to religious school or a Jewish camp as a demonstration to their children of their own commitment to Judaism.

In the teen study section of this research project, adolescents perceived their parents as being influential in the initial decision to continue with—or drop out of—Jewish education after Bar/Bat Mitzvah. Parental encouragement was especially important in getting kids started in post-Bar/Bat Mitzvah classes. Later, the teens made the decision for themselves. But initially, parental involvement and encouragement made a big difference. Parents who insisted on their children attending classes often had a big impact on their teenagers' internalized values. Teens from those families were more likely to eventually choose to continue Jewish education on their own. In contrast, parents who failed to encourage their teens to continue their Jewish education but who rather capitulated as soon as their children voiced complaints often seemed, in their children's eyes, to be acting out of

their own ambivalence. And indeed, as the interviews with parents show, parents had a dramatically wide range of responses to their teenagers' resistance to continuing with Jewish education, and that range corresponded to their own positive and/or negative feelings. Teenagers were quick to pick up on their parents' attitudes.

In short, our interviews confirmed that parents are actively engaged in making educational decisions for their children and that the attitudes of parents are often the critical factor affecting how children come to regard their Jewish education.

Jewish Education Can Be a Source of Family Friction

There is no denying that Jewish education also has the potential for engendering negative feelings in the family. For example, the following comments by a mother reflect her frustration with her daughter's complaints about attending a religious school in a Conservative synagogue:

"I honestly can't tell you [about impact]. I think she feels a lot of accomplishment in what she did by being Bat Mitzvah and I think...being around more Jewish kids has helped. But as far as really a Jewish identity, a feeling about the importance of the State of Israel, really understanding all the Jewish heritage, I don't know that she's gotten any of it. I think she's resented every day being there. It's like, 'I'm bored, I'm bored, I'm bored,' but I know from her report card that she participates when she's there. She's a good student. Is this a show for Mom and Dad? 'Don't make me go. Please can I skip it?' Her first thing after Bat Mitzvah was, 'I don't have to go to Hebrew school anymore. Can I quit tomorrow?' It's like, no, you can't."

Religious school attendance can be a matter of dissatisfaction to the child (though the mother above hints at the possibility that her daughter may be having a more positive experience than she lets on to her parents). The experience can result in tension between parents (who might be advocating/requiring religious education) and children (who might be resisting). This can be exacerbated by schedule conflicts between religious school and other activities (sports, clubs, etc.). While parents report a range of reactions to such conflicts, they frequently claim to be enforcing religious school attendance, with some exceptions made if the

conflicting activity is of particular importance (e.g., a parent may not allow a child to miss religious school for a soccer game but may allow cutting Jewish schooling for the soccer playoffs). In short, Jewish education, can spur internal conflicts within families or become the battleground for other family tensions—still another dimension of the complex interaction of families and Jewish education.

Parents Are Clients of Jewish Education

Many parents candidly concede that they themselves are engaged in Jewish education, often in order to remediate what they never learned as youngsters or in order to address questions that their own children posed. As one parent said:

“It was important to me to marry someone Jewish, but until we had kids, I kept my distance. So I had some Jewish education as a kid, but I didn’t immerse myself in it. I didn’t value it. And now, as an adult, I’m coming back and loving learning. I take seminars and courses and lectures when I can.”

The extent to which parents were spurred on to further their own Jewish education and upgrade their own Jewish knowledge is made clear from this sampling of observations by day school parents regarding the impact of their children on their own Jewish engagement and interest in learning:

“They’re leading us on a Jewish journey” [a highly involved Reform mother].

“[My children’s education] has been the most important Jewish experience of my life” [the same mother].

“We’re learning through them” [Reform mother who had converted to Judaism after she married].

“There is more Jewish conversation in the house” [a Reform father, converted from Catholicism].

“You feel stupid when your child knows things that you don’t” [a Reform father who had received a limited Jewish education as a child].

“[Through the children] I’m learning more about being a Jew in this world” [an adult convert to Judaism whose child was enrolled in a Conservative day school].

“Our life is focused around the Jewish calendar because of the school calendar” [a Schechter graduate, a mother whose own children are at a Conservative day school].

“This is the first time that we actually belong to a community of friends” [a newly religious Orthodox mother].

“You’re more careful about things because you want to teach your children” [a modern Orthodox father with children at a modern Orthodox day school].

In quite a few homes, parents have introduced Jewish rituals for the first time, ranging from the traditional to the unconventional. As examples of the latter: We encountered parents and children who recite blessings together when they see an ambulance go by or when they go camping over the holiday of Sukkoth. More conventionally, a number of parents have started adult study, taking up Hebrew, a review of the weekly Torah portion, a study of Jewish history, and other subjects.

Some supplementary school parents talk about either undertaking new rituals in response to what their children have learned or taking special pleasure in Jewish participation as a result of their child’s involvement. The former was alluded to by a parent who reports sitting down for a Shabbat dinner only once every month or two but never having done so “before the kids started getting involved [with the religious school]...” Or, as another mother of children in a synagogue supplementary school put it:

“...they talked about it in school and they bring things home. ‘Let’s do this, Mom, and let’s do this, Dad’.... We’re not going to say no to it if they want to do something like that, but it’s nothing that [we] would institute without religious school.”

The latter phenomenon is illustrated by a father who has two daughters in a Reform temple’s religious school:

“We were in services a couple of weeks ago.... I just remember very distinctly having a good, positive feeling sitting between both of my daughters who knew the service and know the prayers and speak it fluently and with ease. It made me feel good. I obviously wouldn’t have had that feeling before they were in school. There wouldn’t have been a service like that.”

A number of parents report that their child’s participation in religious school has led them to become more involved in the synagogue. As reasons for increased attendance at services, some parents mention religious school “requirements” that they attend services occasionally or their feeling the need to “set an example” for what the children are learning in religious school.

Quite a number of parents also attribute their motivation to learn more about Jewish life to their eagerness to explain complicated aspects of Judaism to their children and thereby to “alleviate confusion.” Parents observe that as their children learn more, their questions become more complex, and that places greater pressure on the parents to have the knowledge to answer questions. Several parents also talk about learning from their children, or as one father puts it, “we learn as they learn,” from the new information, materials, and rituals the children bring home with them. All this suggests the need for a far more dynamic and complex understanding of who the learners in Jewish educational programs are.

Jewish Education Can Build Communities

The interests sparked in parents by their children lead not only to a quest for more knowledge but in some cases to greater participation in Jewish civic activities. On the most basic level, some parents turn to adult education programs to enrich their knowledge, which in turn brings them to synagogues or programs of adult study where they meet other Jewish adult learners. One mother of children enrolled in a Reform temple’s supplementary school reported, for example:

“My husband [is] going to Torah study now once a week with the rabbi, which he never did before.... I think it was about two years ago when they [the children in religious school] were starting to do the parshas [Torah portions] and they would come back and I wouldn’t know exactly what they were talking about. But...my husband said [we] have to start learning this. Then he went to a Torah study [class].... He does that by himself now.... I mean, if he couldn’t answer the questions...that’s kind of sad.... My younger one was coming home with all these Hebrew words I didn’t know. I said, “Oh, these are basic and I don’t even know them.” They handed me a sheet with definitions. I said, “OK, let me learn my letters; let me know some basics.” So I took [a Hebrew] class. So I think we both started learning more. I think my husband definitely did a lot because he’s continuing every week.... I do it once a month.”

But the social impact of schools on parents goes well beyond their taking up adult study. Parents talk of being drawn into new social networks through their children’s schooling. Among supplementary school parents we studied, when asked specifically about

their friendship patterns, approximately half of the respondents report that at least half of their friends have children in the same religious school, whom they met because of their mutual association with the religious school. This pattern is even more evident among day school parents interviewed: Their children's schools have created a social network where the parents meet peers. In both settings of formal education, parents specifically mention the overlap of the social group formed by both the religious school or day school and the synagogue they attend. Indeed, the synagogue parents attend often dictates the day school they select because they want their children's school friends also to be their shul friends. In some cases, the reverse occurs: day school enrollment helps determine the congregation with which parents choose to affiliate. Here, as elsewhere, there are multidirectional relationships between the family, the school, and the synagogue.

For Young People Too—The More, The More

For young people, too, Jewish education reinforces Jewish engagement. This happens in two important ways: Firstly, those who participate in more intensive forms of Jewish education tend to be more actively Jewish in their religious observances and likely to befriend other Jews. They bring with them to the classroom, group, bunk, or Israel trip higher levels of familiarity with and commitment to things Jewish, which, in turn, engage them in Jewish life far more than those who are exposed to less intensive forms of Jewish education. Various educational experiences can draw and build upon a cultural predisposition toward Jewish engagement among participants that derives not only from the home and community, but also from mutually reinforcing Jewish educational experiences. Undoubtedly, the curriculum and educational staff play a significant role, but so do the social networks created by the cluster of programs of formal and informal Jewish education.

Secondly, more intensive and extensive Jewish education of one type is also associated with other forms of Jewish educational activities. Participation in youth groups, overnight camps, and Israel trips generally increases with the intensiveness of Jewish schooling. For example, merely 8 % of Jews with no formal Jewish schooling report having attended a Jewish summer camp, compared to 31 % of Sunday school attenders, 43 % of supplementary

school students, and fully 77% of Orthodox day school students who attend Jewish summer camp. Moreover, participation in one type of program of informal Jewish education often translates into participation in other types of programs: For example, participants in youth groups were twice as likely as non-participants to attend a Jewish summer camp and to visit Israel. Jewish educational experiences frequently reinforce one another.

These and other findings suggest the need to think about Jewish education as a set of dynamic interactions. Parents and children certainly engage in much bidirectional interplay, with each shaping the other in important ways. And exposure to a range of educational settings also creates an interactive dynamic. We might wish to visualize Jewish education as a series of overlapping circles or layers, each having reinforcing effects upon the other. The dynamism of Jewish education today is further demonstrated by the complex ways parents think about Jewish educational choices, a subject to which we now turn.

Multiple Choices Attract Educational Consumers

In early 21st-century America, choices are critically important to parents. Typically, choice affects families in two separate ways. Firstly, parents strive to be attuned to the individual needs of each child and will therefore tailor their educational decisions with that particular child in mind. This means families are looking for choices to ensure the best possible “fit” for each child. Secondly, it also means that parents’ perceptions of their children’s special needs will trump other considerations—e.g., if a day school cannot meet those needs, parents will look elsewhere. Put into economic terms, parents today are consumers who seek to shop at the boutique that meets their child’s needs. Put in psychological terms, parents invest themselves in each child and see each one as unique.

Choice Matters Greatly To Parents

When asked to describe their educational decision-making, parents repeatedly come back to the matter of “choice.” Most parents understand themselves to be exercising important choices by selecting a school for a child. Many parents we interviewed emphasized the values that guide their choice of neighborhoods in which to settle and schools for their children to attend. They

sought out “good neighborhoods” where schools had excellent reputations, though they rarely explained what an excellent school was.

If parents have increasingly become “consumers” of education who choose among a variety of options, their outlook is linked to a specific understanding of children, of the role parents should play in raising and socializing children, and in ideas about what schooling must provide their children. Parents seek to exercise mastery and control in their worlds by choosing the right school for their children—and they expect their offspring to develop a similar sense of mastery.

The parents we interviewed had highly prized and were deeply concerned about their children’s unique qualities—their needs, their learning styles, their self-esteem—and thus they expected the school to respond to those concerns. The parents were not hesitant to challenge authority, and many of them were emboldened to enroll their children elsewhere when they felt the school failed to serve them. Some parents were willing to place three children in two or three different schools, as long as the unique needs of each child were met by the “right” school. This is how a Philadelphia wife and mother described the educational choices she and her husband made for their three children:

“Even before kindergarten, the synagogue nursery school was too small for my daughter. It is just that her personality was too big for the school. We chose to send her to a Friends School because it requires independence.”

The couple’s middle son is in public school because he is less independent than his sister and “he wasn’t expected to have as high a level of independence as at the Quaker school.” And the youngest son is at the synagogue preschool, which “is a good fit for him.” His parents have not decided where he will go to school next. “Each child,” the mother explained, “is an individual.”

The current outlook of American Jewish parents is thrown into bold relief when compared to the way one parent, not born in this country, expressed his indifference to his children’s secular education. He explained:

“We were more interested in the Jewish side. We didn’t look at it like Americans look at it. People are really very focused and selective on the schools here. We’re not [like] that.”

What he most likely meant is that “we” do not value education in the same way—as the critical avenue to becoming a person, to success, and to achievement. He valued, he said, sports and Judaism for his children.

For the American middle class, the importance of choice and of children’s uniqueness is inextricably linked to the ideal of children’s autonomy, their well-roundedness, economic success, and ability to maintain a certain social standing.

The Day School Choice

Parents are moved by different sets of considerations when they choose a day school education, as compared to a supplementary school program. Using the data from our survey of JCC members who are both Jewish and parents of children who live at home, our analysis identified attitudes relevant to their decision to consider day schools for their children. (The practical issue of costs was not raised in this context, as we were concerned with perceptions.)

The three most significant attitudes that emerged from this study were:

- The aspirations for one child’s Jewish development—i.e., the extent to which parents hoped their children would develop a strong Jewish identity.
- The perception of day schools as effective instruments of Jewish education.
- The perception that day schools “ghettoize” their children, and the concomitant fear that children enrolled in day schools do not learn how to relate to non-Jews and that they turn out “too” religious.

All three attitudes exert moderate effects upon the decision to send one’s child to day school, with the first two directly related to the decision and the third inversely related. In other words, the more parents aspire for their children to develop strongly as Jews, the more parents have confidence in the ability of day schools to educate. And the less they fear “ghettoization” in the day school, the more likely parents are to send a child to day school, or at least to consider it seriously.

Certainly other factors are at play here. But our analysis was also able to dispose of certain considerations. Thus, while Jewish commitment on the part of the parents increases their preference

for day schools, it operates solely by way of aspirations—that is, through the hopes one harbors for a youngster to be committed to living as a Jew. In addition, the analysis lent support to the notion that concerns over academic quality are not the sole consideration of parents. A “good enough” academic quality renders the day schools a plausible option. Other factors make them “desirable” and sometimes necessary” choices. These other factors might include educational excellence but will more likely include social and personal factors that make them a good fit.

As day schools of all stripes proliferate, the day school parent body becomes more diverse, and parental motivations for enrolling children become more complicated. Increasing numbers of day school parents are not Orthodox, and many adults in the parent bodies of both Orthodox and non-Orthodox schools were not themselves educated in day schools. Frequently, their public and supplementary Hebrew school experiences are in fact the motivating factor in choosing day school. One couple explained that their strong bias in favor of day schools was a result of the fact that both of them had gone to public schools and had “unhappy” Hebrew school experiences:

“My observation was that it hasn’t gotten better; it had gotten worse since I was a kid. There were two or three options, the Reform and Conservative day schools (elementary schools), and the Reform school seemed too small and ideologically inconsistent at the time. The Conservative school seemed to work.”

Logistics can also be a factor in the day school choice. The long school hours at day schools can seem advantageous to working parents who put in long days in the office. Practical considerations, and not only values, come into play. As one day school father explained:

“Besides the fact that both of us are committed to day school in concept, also logically, Hebrew school isn’t going to cut it for us, because there isn’t anybody to drop [the children] off.”

Our interviews with parents yielded a range of specific items they sought when enrolling their children in day schools. While most day school parents express an interest that there be what they call “a fit” between their homes and the school, for Orthodox parents this is a primary concern. In fact, this aspiration surfaced unprompted in almost every interview with Orthodox parents.

Some indicated that they only decided to move to a city after they had assured themselves they could find a school offering such a fit. One set of parents claimed that they would prefer a public school rather than send their children to a Jewish school where they do not fit. For many day school parents, then, their preference for day schools is tempered by their need to assure themselves that the school provides a good fit for the unique needs of each child and that the school's Jewish outlook is compatible with that of the family's.

Finally, it is striking how much the day school option is in tension with the insistence of many parents on exposing their children to "diversity"—by which they mean providing their children with the experience of dealing with people of different ethnic and religious backgrounds. Even if they were not afraid of their children becoming "too religious," many parents feared that their children would not know how to function in a diverse group of peers in high school after a day school elementary education. Some believed it was simply un-American to attend a day school. Concern with exposing their children to what they labeled "diversity" was the most widely cited reason for not selecting a day school.

Parents who considered day schools—or who enrolled their children in day schools and then switched them to public school—were asked about their decisions. They offered a variety of rationales for their decisions, with the same parents often giving several explanations. Many cited financial or logistical obstacles (e.g., the day school is too far away). Parents were concerned about whether day schools could address their child's specific learning issues. Almost all of the parents mentioned the high quality of the local public schools. And then parents discussed their belief in the importance of public school education and the value of exposing their children to diversity as preparation for the "real world" (a phrase used by many parents). Parents expressed fears that day schools promote insularity, as was evident in the following exchange between parents who enrolled their children in a Reform temple's religious school:

Mother: "...and now that [my daughter is] in public school, I actually feel that you have to learn how to..."

Father: "...integrate herself."

Mother: “Right...and take pride in being Jewish. Whereas, if she was at a day school, she wouldn’t think about it.... Everybody would be Jewish. Here, she goes to school, and she has learned to stand up for being Jewish—‘I’m proud of this; this is who I am. I don’t celebrate Christmas, but we can still be friends. Come to my house on Friday night...I’m going to services. Can you come with me?’ Their friends come with us to temple, and they get to experience something that they would never have experienced.”

There is no denying the profound concern many Jewish parents express about exposing their children to diversity, rather than “ghettoize” them in Jewish day schools with only other Jews as their classmates.

The Supplementary School Choice

In the current climate of American Jewish life, parents face a real decision whether or not to enroll their children in any program of Jewish education. According to the NJPS 2000–01, to cite one data set, 28 % of Jewish children between the ages of six and thirteen were not enrolled in any form of Jewish schooling, and 20 % of Jewish children receive no Jewish education. The most basic question for parents, then, is whether to opt for Jewish education at all. For those who do seek a Jewish education for their children, the next question is: Which setting do I prefer—once-a-week Sunday school, two- or three-times-a-week supplementary school, or day school?

Not surprisingly, parents who opted for supplementary school education did not employ a uniform vocabulary to express their hopes and dreams for what their children would take away from their Jewish educational experiences. Supplementary school parents stressed the importance of their children “carrying on” (a frequently used expression) Judaism into the next generation, as in these remarks by a married mother whose son was enrolled in a Conservative synagogue’s supplementary school:

“First of all, I hope he would marry somebody Jewish and keep the lines going. But I also would hope that he would bring up his children and give them the opportunity to have the identity and the heritage and... have Shabbat and the holidays the way we did with him because we think it’s been an important part of their childhood.... Like for example, whether he keeps kosher in college or not,

that's up to him That aspect of it is not as important to me, even when he gets married, but I think it's important to instill Shabbat in your children and just the identity and the heritage and just the different holidays and things like that."

Some supplementary school parents see this sense of connection to Judaism as helpful for maintaining a positive self-image in a predominantly non-Jewish environment. They are aware of living in an area where Jews are a minority and where Judaism is not as available in their neighborhoods in the same way as it might be in an area of dense Jewish concentration. While parents generally do not speak about anti-Semitism in their own or their children's experience (though a small number describe awkward experiences they or their children endured due to their being Jewish), parents acknowledge that their minority status may have a negative impact on their children's identity. They want their children to feel comfortable and have a sense of pride, despite being "different." A Southern mother whose children were enrolled in a Reform temple's supplementary school expressed her aspirations as follows:

"I would like them to have a basic knowledge about what it is that they're learning and talking about. I'd like them to feel comfortable about being Jewish. We are not in a highly Jewish population here, so I'd like them to feel comfortable saying, 'Oh, we do things this way.' I'd also like them to just know the routine... [that] is, what we're going to do on this holiday and this is what we're going to do on this weekend."

Some parents speak with pride of their children's ability to maintain a sense of themselves as Jews even in the face of their minority status. For example, the same mother describes how the religious school experience helped her son confront issues of Jewishness with his public school peer group:

"Well, I know for my oldest, a sense of identity and being involved in the religious school for so long and being at the preschool, he is figuring out why the things he does are different.... He's comfortable in seeing that, and that is okay, and that he's not wrong and that someone else isn't wrong. He's comfortable in saying, 'I do things this way.'

The Salience of Denomination For Educational Decision-Making

Contrary to recent reports about the declining salience of denomination, our field research and quantitative survey uncovered strong evidence of continued variations along denominational lines. For all measures, Conservative synagogue members report more frequent Jewish educational participation among their children than do members of Reform temples. In two instances, the gaps are rather pronounced: Among respondents to the NJPS survey, while 59 % of Conservative parents report their child attended a Jewish preschool, just 39 % of Reform parents did so. Perhaps more significantly, the same survey found that while a substantial minority (25 %) of Conservative children have been enrolled in day schools, we find hardly any (4 %) Reform children who had been enrolled in day schools. Orthodox Jews, as is well documented, tend overwhelmingly to opt for intensive forms of Jewish education, especially day schools.

Conservative parents also report their children attending religious school for more days of the week than do Reform parents. In addition, as we see from the JCC members' survey, when asked how frequently they would like their children to attend religious school, Conservative parents are largely divided between those preferring two or three days of the week, while Reform parents are divided between those preferring one or two days a week.

Our study of supplementary school families offers some further refinement of these matters. There was a great deal of overlap in the expectations that Conservative and Reform parents had for Jewish outcomes and religious education. Still, the key areas of differences were that:

- Conservative parents (but generally not Reform) mentioned the benefits of the Bar/Bat Mitzvah experience in helping children learn synagogue skills.
- Some parents discuss the religious school and synagogue as a place where values hold steady in a world that does not always reinforce "good" values. Parents seem uncertain whether there is a "Jewish" aspect to these values or whether these values are more universal or possibly without connection to a specific religious foundation. But Reform Jews are far more likely than Conservative ones to believe the religious school has a mission to

inculcate proper values and behavior. Reform parents assume that their schools will impart positive character traits to their children.

- Many parents talk about the Bar/Bat Mitzvah in terms of their child's growth as a person, gaining self-confidence (emphasized slightly more often by Reform parents), leadership skills, or a sense of accomplishment (emphasized slightly more by Conservative parents) from what they have done.

Non-Jewish Parents Are Playing an Active Role in Making Jewish Educational Choices and in Guiding Their Children's Jewish Education

Our field research uncovered a rich array of effects that are associated with the phenomenon of non-Jewish parents raising Jewish children, including those children who enroll in Jewish schools and whose families join congregations. Mixed married parents, particularly the non-Jewish partner and even those raising their children as Jews, think about being Jewish in quite distinctive ways and use a very different language than in-married Jews who were born Jewish when considering their children's Jewish education.

The quantitative aspect of our research examines how three sorts of families (all of whom are married couples raising their children as Jews) differ with respect to the Jewish educational participation of their children. There are large and predictable gaps between the in-married and the inter-married. The children of the former are more than twice as likely as the latter to attend a Jewish preschool, Jewish day camp, or Jewish youth group. They are more than four times as likely to attend a Jewish summer camp. While 32 % of the in-married Jews surveyed by the NJPS 2000–2001 reported their children are in day schools, less than 3 % of the inter-married made the same claim. Overall, over three quarters of the former were reported as currently enrolled in a Jewish school as compared with just 18 % of the latter.

As striking as these differences may appear, perhaps even more surprising is the considerable extent to which conversionary families lag behind in-married families in their utilization of Jewish educational programs. Attendance at Jewish preschools and day schools is more than three times as frequent among the in-married as among families in which one parent is a convert to

Judaism. We find roughly a 2:1 ratio with respect to Jewish day camps, overnight camps, and youth groups. However, both in-married and conversionary families do report equal levels at which their children attend any sort of Jewish school.

Beyond these patterns of enrollment preferences, there are questions of religious and educational outlook. Some of the change in language used by parents has been introduced into the community by the growing numbers of non-Jews who play a role in the Jewish education of their children (possibly by converts too, but we have no data as yet on this). According to the NJPS 2000-01, 10 % of Conservative children and 20 % of Reform children are being raised by a non-Jewish parent. Though it would be an exaggeration to claim a uniformity of language in either category, Jews and non-Jews engaged in raising Jewish children brought a strikingly different religious vocabulary to the way they thought about their children's "religious" education. We heard literally two different discourses: Often, Christian parents and even some converts offered rationales for giving their children a Jewish education that is strikingly different from the way born-Jewish parents frame their decision. Those raised outside of Judaism anticipate that their children's Jewish education will provide them with a relationship with God and offer them guidance for their lives. A Philadelphia attorney who was raised as a Catholic described herself as "comfortable raising her children under the umbrella of religion," despite her own lack of interest in church:

"I wanted their school to be the place where they would be thinking about the bigger issues, the ethics, the morals, and the values. I wish there was more of it in religious school. They get more of a sense of community, ethics, and social action and less information. I think it's a better mix than the opposite, if I had to pick the mix. I think what they don't have so much is this idea of God and spirituality and whatever. Not that you have to be a believer, but I wanted them to be thinking about this as a question."

Another mother, raised with virtually no religion at all, echoed the same sentiments when she spoke of what she would like her children to learn:

"Life, death, God, and morality. They get ethics from us and school and various places. But just thinking about these very deep moral issues should happen at their religious school."

A Philadelphia teacher who was raised as a Catholic and once thought of becoming a priest reported that what he wanted for his four children's "religious training" in a Reform supplementary school was to be "able to identify with some greater thing in the world. "Faith," was what he wanted for his children. He added:

"I don't really look at the religious aspect of it from a Jewish standpoint. It's just that it's the faith we've decided to participate in. I shouldn't say I don't look at it as a way of life, because obviously, we try to assimilate life within the teachings. It is important that both parents be involved with the children, in religious and general education, and of course, with their lives."

The vocabulary of spirituality and God, in contrast to peoplehood, holidays, and history is not alien to Judaism, particularly at this moment in time when a "religious" vocabulary is increasingly ubiquitous in American society. However, just how extreme the contrast might be was made evident in an interview with a Philadelphia businesswoman who is Presbyterian. At the Reform temple where her children are enrolled, she chairs the Designated School Program committee, a three-year ad hoc committee whose purpose is to "determine what's working within our religious school and what's not."

"For me the hardest part I have about understanding Judaism is the fact that there are cultural Jews (which for me is bs), and then there are religious Jews. Judaism is a religion to me, as an outsider looking in; it is a religion before it is anything else. A lot of people will argue that with me, including the rabbi and the head of the religious school."

The contrast in outlook of Jewish-born parents and those not born Jewish was often quite dramatic, perhaps best understood as an emphasis upon a Judaism of family and festivals as compared to a Judaism of faith and feelings. When asked, "How do you act as a Jewish parent?" families with two Jewish-born adults tended to describe and even list the activities and rituals in which they engaged. For them, the emphasis is on "practice," even when observance is anything but extensive. One Reform stay-at-home mother phrased her approach succinctly. "I am making Jewish memories." She explained:

"By being a role model, I'm a Jewish parent. I always make

latkes for Hanukah. I even make doughnuts for Hanukah so they'll think, 'Mom made doughnuts for Hanukah.' I make hamantaschen for Purim. I made challah a few times, matzo ball soup. Generally, we have a big Sukkah party every year, an open house. We get three babysitters and have everyone bring kids. My son sets up a disk jockey thing and we get glow necklaces. Everyone really looks forward to that. By helping them to build memories around Jewish holidays and events, I'm a role model."

Cumulatively, these findings illustrate the complex ways in which today's parents think about their children's Jewish education—and some of the factors that shape their thinking. Parents seek choices and insist on placing each child in the school that best matches the individual needs of that child and also fits closely with the family's outlook. Today's parents think about such matters in a far more consumer-conscious fashion than did their predecessors. They are also likely to regard schools as settings where important lessons in socialization and values are communicated. And their thinking about Jewish education—the language they use to describe their aspirations for their children and how they choose a school—reflects a range of influences, including their denomination and whether or not they were born Jewish.

Community Can Trump Demography: The Community as a Key Context For Jewish Education

By situating its research in a range of communities around the country, this project has confirmed the axiom that Jewish educational arrangements vary greatly by community. Some important variations are conditioned by local historical and cultural circumstances. In some parts of the country, innovation is constrained by the heavy hand of traditionalism — i.e., "This is the way we do our business." In other places, a spirit of innovation and entrepreneurial derring-do have produced a sense of forward movement. Communities with a significant influx of new arrivals have an advantage because newcomers seem less constrained. But sometimes, even newer Jewish communities are hampered by a culture of indifference and weak civic engagement. All of these factors affect the extent to which new educational programs are established, whether they are properly funded and whether champions

of Jewish education are likely to emerge in a community.

The commitment of key communal leaders makes a major difference, too. In some communities, federation leaders have spearheaded new initiatives, whereas in others, much of what has been built has emerged despite the indifference of the federation.

Federations in turn are often at the mercy of the local “culture of giving” that has developed in each community. Some communities have a well developed sense of communal responsibility, which in itself ensures significant levels of giving and also the accumulation of a large endowment fund that is especially helpful for launching new initiatives. In others, volunteering and civic engagement are not valued by the larger community, and local Jews seem reluctant to play a role in support of their own institutions. The efficiency of fundraising in some Midwestern cities, for example, stands in marked contrast to the relatively low levels of giving in many Sun Belt communities, where there is no shortage of wealthy Jews but a serious absence of community-mindedness. Our findings confirm the strong correlation between the general “culture of giving” in each metropolitan area and patterns of philanthropy among Jews in those areas. The insufficiency of financing, in turn, has a major impact on what communities can undertake in the educational realm.

The composition of a community also affects its commitment to Jewish education. Where Orthodox Jews are represented in higher percentages, they constitute a lobby for Jewish education. By contrast, communities with an inordinately large percentage of Reform Jews tend not to be nearly as interested in Jewish education. In some communities, Conservative Jews have created a range of day schools and other educational institutions; in others, they have been relatively insular, focusing mainly on their own congregational schools. In all cases, new interventions have made a difference, particularly in the form of adult education programs. Alumni of the Wexner Heritage Program have become lobbyists for improved Jewish education, and there is some evidence that adult students of the Florence Melton Adult Mini-Schools and the Meah program based at the Boston Hebrew College are also active champions of Jewish education.

And then there are the serendipitous factors, usually related to the influence of a few key people who happen to take a strong

interest in Jewish education. In some cities, the educational commitment of a JCC executive makes all the difference; in others, the JCCs are virtually non-players in the field of Jewish education, largely due to the lack of interest of key staff people. Yet here too our story is complicated by local values and traditions. In several communities, key federation leaders who wanted to invest more resources in Jewish education were thwarted by advocates of the social service agencies; they could not move the system, despite their best intentions. It is therefore not only a matter of having the right person in place who makes Jewish education a priority; that individual also needs a communal support system receptive to educational investment.

Beyond historical and cultural patterns and also communal priorities, our survey of communities also highlights vast differences in the types of educational programs supported and encouraged. In most communities, day schools receive the lion's share of funds for Jewish education, while congregational schools benefit from virtually no communal assistance. A number of the central agencies we have encountered have deliberately understood their mission as one of aiding congregational schools, because the latter are treated as stepchildren by the federation. Some of these bureaus will concede that they are not set up to aid day schools, because the community never gave them the resources to reach into day schools in a serious fashion. Others will justify their investment in congregational schools by noting that for too long, such schools were left to their own devices, even though they continue to educate the majority of Jewish children. Some bureaus of Jewish education serve valiantly as the central address in town for considering and coordinating Jewish education; others are marginalized and ineffective.

There are also differences in the way communities address informal Jewish education. Some invest heavily in early childhood programs, while others promote adult education; some focus on both areas, regarding preschool children and their families as the best investment for educational outreach. When it comes to programs for the post-Bar and Bat Mitzvah set, some communities invest most heavily in Israel trips for teens, whereas others have worked to bolster youth programming or summer camp opportunities. Few communities consistently invest in all three options.

Indeed, the way in which communities channel resources to the range of informal educational programs and the type of program each favors most are among the distinctive features of the various cultures of Jewish education we have studied.

Despite these important culturally and historically conditioned variations from one community to the next and the serendipitous effects of some key leaders, there are also generic challenges shaping communal responses to Jewish educational needs. A great many communities are facing some or all of the following challenges: an ever-widening geographic dispersal of Jews within localities, a stagnant level of funding available through federation campaigns, a dearth of champions of Jewish education who use their financial and political clout to elevate Jewish education within the priorities of the community, and the modest impact of national bodies upon local educational developments and programs.

Despite the complex variations from one community to the next, anyone interested in Jewish education must face a fundamental reality: All Jewish education is local. Local circumstances and needs shape the educational options available, local support plays a vital role in channeling learners to programs, and inadequate local support systems undermine the effectiveness of Jewish education. This point is dramatized by our analysis of the significant communal variations in how Jewish educational programs are utilized.

How Communities Make a Difference

Not only do the Jewish educational options and resources vary from community to community, but the likelihood that people will use these options varies as well. It is not accidental that in some communities far higher percentages of teens enroll in formal schooling and participate in youth groups, Israel trips, and overnight camping than in others. Some communities foster such participation through a serious investment in programs for training educators, upgrading the quality of programming, and marketing the programs. Not surprisingly, these efforts pay off when we look at the numbers of learners recruited. For example, our JCC survey in five localities shows that in some communities, a majority of JCC families have sent their children to day school (59 % in Baltimore) whereas in others only about a quarter have (26 % in

San Francisco). (This difference is not attributable solely to the higher percentage of Orthodox Jews in Baltimore.)

Although communities differ, they do not always do so in consistent ways. For example, whereas Baltimore is a leader and San Francisco is a laggard in terms of day school enrollment, the communities do equally as well at recruiting JCC children to overnight Jewish camps. Detroit, meanwhile, is a leader both in day school and camp enrollment.

A key question to consider is whether overall trends in Jewish life across the country are so strong that they overwhelm the ability of local communities to shape their own conditions. Evidence from the JCC survey offers grounds for optimism: Some communities appear to have met greater success in reaching out beyond the base and in recruiting people to Jewish education who, were they living elsewhere, might not be involved.

In each community we studied, the parents with stronger Jewish upbringings are more likely to enroll their children in educational venues like day schools and camps. But what about those with weaker Jewish backgrounds—are they impossible to reach? The JCC survey suggests that communities can and do succeed at outreach. Strong day school communities like Baltimore and Detroit are better not only at attracting their base but also at expanding beyond their base—that is, they recruit families who are low in their prior Jewish commitments.

Local communities provide a range of schools and programs, operating for the most part as autonomous institutions. Under the best of circumstances, these institutions are loosely coupled; in most communities they are barely connected. Few communities have either professional or lay leaders who channel families to the range of educational opportunities. Even communities with a large network of schools and programs fail to think systemically or strive to coordinate educational opportunities. When they do set their minds to enhancing a particular form of Jewish education, such as day school education, teen trips to Israel, or overnight Jewish camping, communities can create a hospitable climate and provide the incentives to make these options popular. They can reshape the thinking of families. Through their constructive engagement, communities can—and do—affect the way local Jews utilize various forms of Jewish education. Simply put,

not all communities are the same: The ways some go about their business makes a great difference in how many learners take advantage of particular educational opportunities.

Policy Implications

The hard work and investments of the past few decades have built a momentum in Jewish education. We do not have to create something from nothing but rather to sustain and further build upon the momentum. The good news about Jewish education is that we can substantiate the cumulative effects of Jewish education and the powerful impact of informal Jewish education.

We know about the value of more intensive Jewish education—more years, more exposures, more time devoted to such enterprises. All of these factors engage young Jews and draw them into social networks that reinforce Jewish participation.

When communities invest in a range of programs and enhance educational efforts, they are making a long-term investment in the Jewish future. Those that do not are shirking their responsibilities to nurture a next generation. We need to find incentives to encourage communal investment in the range of programs. And perhaps we should find ways to pressure those communities that are remiss in making such an investment in the future.

Parental Choice and the Marketing of Day Schools

Parents are speaking a new language today when they talk about Jewish education. As we have noted, they certainly focus on the needs of each child, and they will avoid enrolling their children in schools that do not meet their unique needs. Even as parents make educational decisions in their children's best interests, they simultaneously consider the efficacy of the educational environment for their own purposes. In short, Jewish education, is an investment for their children and also for themselves.

Mothers particularly see their school choices and their involvement with schools as defining characteristics of their own identities. (Our research confirms the central, though certainly not exclusive, role women play in Jewish educational decisions and in bringing their children to school.) The educational decisions of parents are therefore not based solely on what is best for the child but on the setting that also meets the needs of the par-

ents. Day school parents, for example, decide on a school based on what is acceptable within their own community and among their peers. They seek a school where they, the parents, will feel comfortable with other parents. True, there are boundary-crossers: Some Modern Orthodox parents send their children to a Schechter or community day school; some Conservative and even Reform parents send their children to Orthodox schools. That usually happens only if a peer group of parents in the school makes it comfortable or if the child's needs are so clear that the decision comes down to "what is best for my child." The same holds true to some extent for supplementary school parents, who regard the enrollment of their children in a synagogue school as part of a larger family investment in a congregation. They, too, seek a peer group among the congregation's members.

One potential implication of these tendencies is that the merging of smaller day schools into one larger school will not necessarily appeal more to parents who are looking for very particular types of schooling for each child. More parents may opt out of Jewish schooling, especially day schools, if niche schools are unavailable. Moreover, as long as day schools cannot offer serious programs for the most gifted and those with learning difficulties, day schools will be at a disadvantage. Clearly, there are important cost considerations, and communities must weigh the cost-benefits of larger communal day schools. In some locales, such schools have proven a beneficial replacement for failing smaller ones; in communities we have studied, parents have expressed a strong preference for placing their children in schools whose ideological or pedagogic language suits their family's needs.

Local communities have understandably placed a premium on minimizing duplication and maximizing efficiency. To achieve these goals, they have pressed day schools to merge, and they have favored the creation of community day schools at the expense of denominational oriented schooling. These inclinations toward streamlining are understandable, but they may be shortsighted in an age of boutique shopping by consumers of Jewish education. Parents seek niche schools for their children, and unless larger schools can provide tracks for children with different interests and abilities, they may, in the aggregate, attract fewer children than an array of smaller schools with more clearly defined missions.

As they engage in recruitment, day schools will have to pay more attention to the language employed by parents and their aspirations for their children. Many day schools and the Partnership for Excellence in Jewish Education (a supporting agency for day schools) speak of excellence as an end in itself. This seems to be the focus of much day-school advocacy work: how to achieve excellence and market it so as to increase student numbers. Our research confirms that day schools will struggle to recruit among non-Orthodox families if they are not at least as good as local public schools (good, note, rather than excellent). But it shows that because school selection depends not only on rational choice (the search for a good-enough school), the schools must focus also on other issues: how to access parents' social networks and how to engage with the personal and ideological dimensions in school choice. "Excellence," or whichever term we use to indicate good-enough educational quality, makes day schools a plausible option; other factors make them desirable. Schools need to listen to parents to hear what they are seeking beyond a quality education for their children; many different values are at work as parents make their decisions.

Marketers of day schools, particularly outside of the Orthodox community, must also address concerns parents have about the lack of "diversity" in Jewish schools. They will have to dispel fears that day school graduates are unable to function as good Americans or somehow receive an inferior preparation for living in a pluralistic society. Those who promote day school education will not only need to appeal to the high aspirations parents have to raise children who are committed to Jewish life, but they will also need to overcome what some parents regard as the negative aspects of day schools—e.g., their inability to expose children to "diversity."

Finally, day schools and supplementary schools must develop programs to acknowledge the parents as learners and focus not only on the education of children. Everything we have learned about the bidirectional interplay between parents and children suggests that as parents get more engaged, they will serve as important role models to their children, and as children get more involved, they may be able to draw their parents into greater engagement. Schools are already stretched to serve the needs of

youthful learners, but to succeed, they will have to develop the resources to address their adult learner population, too. Ideally, this task could be accomplished were institutions to work cooperatively, so that schools for children can rely upon sustained adult education programs to address the needs of parents. Here is a patently obvious case where linking the silos—bridging isolated institutions—could do much good.

Investing in Supplementary Schooling

As the educators of the majority of Jewish children, supplementary schools are significant players in the field of Jewish education. But for a variety of reasons, they receive only limited support. For one thing, they are generally tied to congregations, and therefore it is (incorrectly) assumed that the religious denominations offer them curricular support and direction. In fact, supplementary schools operate in isolation and derive only limited benefits from the educational arms of the religious movements. For another, the sheer numbers of supplementary schools are daunting. Housed in thousands of synagogues and other semi-private settings, they seem impervious to supervision. And for another, the track record of such schools in teaching basic skills and Jewish literacy relegates them to second-class status. If supplementary school graduates exhibit such low levels of Hebraic and Judaic literacy and their long-term engagement with Jewish life tends to be weaker than day school products, why bother with them? The answer is that with the exception of the Orthodox population, only Conservative families send a significant minority of their children to day schools. Unless we are prepared to write off the majority of young Jews, we must find ways to strengthen the field of supplementary Jewish education.

Supplementary high schools are particularly worthy of new support. They already tend to attract teens whose personal commitments and family background have disposed them positively toward Jewish engagement. In our JCC survey, 62 % of day school dropouts in Boston continue their Jewish education in a supplementary program. Some go on to high school (close to one-fifth of students enrolled in the Prozdor—the trans-denominational school of the Boston Hebrew College, which enrolls 1,000 high school students—are former day school students). Others who drop out of day schools after the 5th or 6th grades continue their

Jewish studies in the years leading up to their Bar or Bat Mitzvah in a supplementary program. Moreover, those who continue their studies into high school tend to come from families that encourage Jewish involvement. Significant percentages of such teens also participate in youth movement activities, trips to Israel, and summer camping. Students in supplementary high schools are resisting the post-Bar/Bat Mitzvah dropout syndrome. They deserve a strong education. Unfortunately, few communities know how to address this population. There is a critical need to develop a supplementary high school initiative to offer curricular and programmatic guidance to help communities around the country bolster their programming for Jewish teens. With some creativity, supplementary high schools can also expand their base by appealing to the preoccupations of teens: One community, for example, is experimenting with informal education opportunities to help young people flesh out their resumes with community service work that then enhances their college applications.

At the other end of the spectrum are children who are enrolled in the least demanding form of Jewish schooling—once-a-week Sunday schools. These schools have the poorest track record of producing literate and committed Jews. Graduates of such schools tend to be the least engaged; so, too, are their parents. Where possible, families should be encouraged to move their children from such schools into religious schools offering a program meeting at least twice a week, because Sunday schooling has little positive impact over the long term. But when that is not possible, children in Sunday schools must be offered opportunities for enrichment through specially designed programs that will complement their Sunday school experiences. Perhaps we need a separate track of programs for these kids. The danger of isolating them is that they will not be exposed to children who take Jewish education more seriously, and their parents will not meet peers who will reinforce engagement. But currently, as the engaged are getting better and more meaningful programs, the disengaged are exposed to inferior programs. We must move the minimally engaged onto a track designed to expand their Jewish horizons.

Families with children in two- or three-day-a-week supplementary schooling also deserve more support. By talking with par-

ents who enroll their children in congregational schools, we learned that while some are minimalists and mainly want their children to endure as they did in religious school or to learn just enough to celebrate a Bar/Bat Mitzvah, a significant population of supplementary school parents has far more serious Jewish aspirations for their children. Quite a few talk about passing Judaism and Jewish connection on to their children; others talk about Jewish literacy; some even talk about Hebrew competency. And still others aspire to “create Jewish memories” for their children, often through music, the smells of cooking, and so on.

It will not do to dismiss the entire lot as people who are not serious Jews. Certainly, intensive Jewish education is a low priority for some supplementary school parents. But others opt for supplementary schools because they regard such an education as the best they can afford and still others believe the combination of public or nonsectarian private school education coupled with supplementary school programs offers the best all-around education for their children. Day school tuition remains an impediment to some Jewish families who do not want to apply for help or go through what they regard as the humiliation of asking for assistance. Moreover, some supplementary school parents are participating in serious adult education programs to improve their Jewish parenting abilities, and also for their own growth. The interaction of such positively inclined parents with one another, both in the supplementary schools and in adult education settings, is fostering heightened participation. Finally, some parents of supplementary school children also enroll their children in Jewish summer camps, youth movements, and Israel trips. They clearly are exposing their children to more than a bare minimum. If nothing else, our study highlights the need for fresh research on supplementary Jewish education and the families who utilize this form of schooling.

By listening to parents, we have discerned an interest among a sector of the supplementary school parent body in giving a Jewish education to their children.

Are they as serious as day school parents? Perhaps only a minority are. But even if most parents of supplementary school children are not as serious, they ought not to be written off as hopelessly indifferent. On the contrary, we must develop ways to

educate parents about educational options; about ways to deepen their children's participation; about ways for the parents to engage in adult education; about ways that Jewish education makes them, the family, and their children better. After all, Jewish parents want "better" for their children. It behooves us, therefore, to invest in supplementary education to make it better and to provide enrichment for children in supplementary school in the form of summer camping, youth movement programs, and the like.

Thinking Systemically

Most medium-sized and large Jewish communities offer a range of programs in formal and informal Jewish education. These include early childhood programs, day schools, supplementary schools, youth movement programs, summer camps, teen programs, and Israel trips. (They also sponsor a variety of adult education opportunities.) Over the past 10–15 years, funders have launched a number of new initiatives to strengthen one or another of these educational settings: PEJE works with day schools, the Foundation for Jewish Camping helps Jewish summer camps, the Jewish Early Childhood Education Initiative is beginning to look into early childhood programs, etc. On the funding side, one or another of these programs has won national champions, such as the AVI CHAI Foundation, which has invested heavily in day school education and summer camps. And on the local level, individuals and foundations have helped raise more funds for day schools, local teen programs, or Israel trips. The question we repeatedly came up against is: Who links the various programs to each other? True, quite a few central agencies for Jewish education are now bringing all local day school educators or all supplementary school principals together. But who is cutting across the various types of institutions? Who is linking the silos?

This question is not academic. Much research suggests that the mix of Jewish educational experiences—the combination of formal and informal programs—has a differential effect on people as they grow older. Children who attend supplementary school but also go on to post-Bar/Bat Mitzvah schooling and youth programs or who attend Jewish summer camps along with their supplementary schooling tend to be more actively engaged as Jews when they get older. The mix of experiences affects the types of involvement in adulthood—e.g., whether the adult will be strong-

ly committed to Israel, Jewish ritual observance, or attendance at religious services.

But who in Jewish communities invests in efforts to channel children into a range of programs? Who is informing parents of the options? Communities offer numerous stand-alone institutions. They offer little guidance to help parents negotiate between them and little open encouragement of children to move naturally from one to the next. This happens informally, so that day school families who can afford to may send their children to the Jewish summer camps that the peers of their children prefer. But families without strong connections are often unaware of such opportunities and are not “naturally” steered to them by peers.

To put this into less abstract language, imagine a bus driving from the preschool to the day school or supplementary school and then to the summer camp, teen programs, and Israel trips. Who is working to get parents and children to board the bus, rather than remain fixed in only one institution? The advantage of such a bus route is that parents will be shepherded from one place to the next—and in the process will talk to other parents on the same bus who may draw them into Jewish educational programs. Our research indicates that this happens haphazardly. Few communities offer such a bus service, and few education professionals think it their responsibility to play the role of bus driver, announcing the stops and encouraging riders to get on and off the bus at as many stops as possible. As a telling example, we learned of a new initiative designed to strengthen early childhood programs, but the organizers have made no provision to work with preschools on channeling their kids to day schools or other Jewish educational programs! What could be more central to the purpose of preschools?

The field of Jewish education has reached a level of maturity where serious resources should be directed at creating the linkages between educational programs. We should recruit the bus drivers who will usher people from one place to the next. We should teach those bus drivers how to channel people and to think about the entire network of education from preschool through high school. We should train and motivate the professional personnel in schools and informal education settings and in central agencies to channel their people to other programs. Undoubtedly, the personnel or agency providing such services will differ from one commu-

nity to the next, but in each community, some educators must be trained to think systemically. Jewish education should be an organic system, not merely a network of loosely connected institutions. The creation of such a system will require attention not only to the parts, but also to the connections.

Opportunities for Policy Makers to Consider

Our analysis has thus far suggested a number of implications flowing from our research. What follows is a set of questions directed at funders, federation leaders, central agency personnel, and educators to consider. These questions have programmatic implications:

1. There is a clear role for federations and foundations to play in incentivizing linkages. The linkages needed are both vertical and horizontal. Part of the job of early childhood educators, for example, is to steer families to the next stage for their children—either to day school or supplementary school. Teachers of Bar and Bat Mitzvah-aged children have a responsibility to encourage their students to enroll in high schools and a range of informal education programs. Currently, this happens haphazardly, if at all. Can we conceive of incentives to spur educators to play such a role in making vertical connections?
2. More broadly, who will serve as the bus driver in communities, picking up parents and children, encouraging them to make stops to sample other educational opportunities? Who will make the horizontal linkages between the silos of Jewish education? And can we conceive of programs to reach into communities to identify potential bus drivers and train them to play such a role? How can we overcome some of the natural obstacles impeding such an effort—i.e., the competition between federations, central agencies, and educational institutions, to get credit for success? Perhaps the first step is to develop a pilot program to ascertain whether personnel are open to taking on the task.
3. Parents are responsive to choices defined by denominational difference. Particularly when it comes to Jewish educational decisions, Orthodox, Conservative, and Reform Jews in the aggregate make very different decisions from one another. Each denominational population has a distinctive profile of

Jewish educational choices. When day schools offer clear and authentic alternatives (along denominational or educational lines), their general appeal increases greatly.

The challenge for communities is to determine if they can cater to the diversifying educational tastes of parents while making efficient use of community resources and while preventing the fracture of an already divided community.

4. Choosing a Jewish day school for one's children can have social and emotional consequences for parents that day school educators frequently overlook in their interactions with their adult clients. These effects can be life-changing and can lead to the school assuming a place in parents' lives once occupied by synagogues. The challenge for schools is to determine the extent to which they should try to further cultivate such effects. School professionals are often uncomfortable acting as parent educators. Most educators became teachers in order to work with children, not with adults. Who will help schools assume the greater role of parent educators? Can we conceive of partnerships between schools and adult education programs to relieve schools of the burden, while addressing the real interests of parents?
5. Recognizing that parental choice for their children's Jewish education affects the parents' educational choices for themselves, how can we develop stronger connections between parents and formal and sustained programs of adult Jewish learning? The AVI CHAI program to aid families with children enrolled in preschools to engage in the Melton Adult Mini-Program serves as a valuable experiment in this regard. But it needs to be expanded to address all parents with children enrolled in schooling.
6. Our research has highlighted the special role assumed by many mothers in their children's Jewish education. While husbands and wives who were interviewed seem to make all decisions for their children together, mothers tend to implement them and to play the larger role in the schools. Should we develop programs to acknowledge this reality? Should we create venues to work with mothers, taking into account that some are employed full-time, others part-time, while still others are not in the labor force?

7. How can we build effective supplementary high school programs geared to the special needs and interests of teens? Ample research attests to the enduring positive impact of engagement with Jewish peers during the teen years. Fortunately, a number of communities have upgraded their supplementary high school programs. But currently no organization monitors their effectiveness. Who will serve as a clearinghouse of information on such efforts? And who will assess programs to develop best practices models?
8. How can we involve serious supplementary school families in more Jewish education for parents and children, to move young people through a network of informal and formal education? How can we learn more about the pressure points in supplementary schooling that can be pressed to achieve more positive outcomes?
9. Efforts to recruit parents for day schools must directly address two significant obstacles we uncovered:
 - a) The sense that day school education will deprive children of the ability to function successfully in a multi-ethnic and socially diverse society.
 - b) The sense that day school education really does not produce youngsters who are more deeply committed as Jews. Day schools require help to formulate adequate responses to these fears. Who will help schools tackle these concerns forthrightly and develop a language and rationale to address parents' deepest concerns?
10. Can we conceive of enrichment programs for those on the least intensive track of Jewish education—the Sunday school? One option is to develop a concerted effort to sway congregations to eliminate this track altogether. But barring such a confrontational approach, can we develop programs that will diversify and multiply the experiences of young people exposed to so inadequate a form of Jewish education? Should we begin to think about special camping experiences for Sunday school children? Or should we develop incentives and support to enroll such children in programs where they will be exposed to more intensively educated peers?
11. How can we help local communities nurture champions of

Jewish education? Our research in seven communities confirmed the impact of the Wexner Heritage Programs in creating a cadre of committed day school champions in some communities. But generally, the cause of day school education, let alone other forms of Jewish education, is weakly supported in most communities, with few obvious financial backers and lobbyists staunchly advocating within their communities. We must create programs to develop a cadre of women and men who appreciate the vital necessity of nurturing the next generation as educated, literate, and engaged Jews, so that the successes of Wexner can be replicated and expanded to the entire field.

12. How can we educate and cultivate future federation leaders and others to appreciate the importance of exposing young people to a range of educational experiences? Whether a community stands behind teen trips to Israel, summer camping, early childhood programs, and other forms of Jewish education is a hit-or-miss proposition. Some communities fund a few of these and let the other options languish. What kinds of programs can we develop to raise consciousness to support the complete range of teen options? Can we design vehicles to reach into communities to educate the key opinion-makers who make funding decisions?

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Should Federations Become More Like Businesses?

Bram Freedman, Brian Herstig, Leslie Robin,
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Federations have frequently heard the message that we should become “more like a business.” What does that actually mean? Is it a good idea? Is it a practical idea? Are there any ways in which good business practices are in conflict with our values or our objectives? What about the roles of our volunteers?

Summary of Conclusions

We believe that federations could benefit from adopting some of the practices of great businesses, but our ultimate goal should be to operate like great federations. Jim Collins of *Good to Great* (2001) fame agrees with us. In his monograph, *Good to Great and the Social Sectors*, he says: “We must reject the idea—well-intentioned but dead wrong—that the primary path to greatness in the social sectors is to become ‘more like a business.’” (Collins, 2005, p. 1)

Major Issues

In Jim Collins’ *Good to Great and the Social Sectors*, he reviews the five principles that he identified as steps to greatness in *Good to Great* for the business sector, and he describes how these apply to the social sector. In this paper, we will look at each of these principles and identify the challenges and benefits of applying them to the federation world.

Defining great—Calibrating success without business metrics in the social sector. Collins notes that in the business world, inputs and outputs are **both** measured in dollar amounts, but this is clearly not the case in the social sector.

How do federations measure their success as organizations? For a good part of federations’ history, public success was largely measured by the size of our campaigns. This focus, however, measures only our inputs and not our outputs. We all understand that success in our development efforts is critical to our ability to fulfill our mission. But while it is critical, it is not sufficient. We can’t be a great organization if we aren’t fulfilling our mission, and we

can't know if we are fulfilling our mission if we aren't measuring the impacts we have on our communities. We must focus more on measuring the success of our outputs.

At the management/operations level of lay and staff leadership, the key objectives associated with achieving our mission (inputs and outputs) need to be clearly defined. We then need to develop ways to measure these key objectives and track our progress over time.

On the governance level, these objectives would be approved and monitored by the board of trustees. A "flash report" of progress to date may be presented at every board meeting, and yearly achievements may be published in the annual report.

Focusing on outputs could have a significant impact on marketing/communications. We may decide that the public launch of a new campaign goal number (again measuring input, not output) may only be meaningful to staff and campaign leadership. And announcing that the goal was reached (or exceeded) may not be important to most community members who don't understand how that achievement impacts on their lives or their community. With a focus on output, instead of hearing about campaign goals and achievements, the community would be hearing about a broad range of additional services and benefits in the community that were made possible by their "great" federation (through the successful campaign).

The principle of measuring output instead of input isn't without its challenges. Measuring our output is not always easy. Many of our key objectives will not be as readily quantifiable as campaign numbers. And in some cases, when objectives are not quantifiable, we will need to identify "indicators" that are evidence of success and that can be tracked over time.

In HRD/leadership development, measuring the number of people who have taken a leadership course is easy, but measuring the quality of their contribution as leaders after the course is more difficult. What are the indicators that demonstrate that the course provided a higher quality of leadership? In addition, measuring the number of new people recruited into volunteer positions is easy, but measuring the quality of their experiences in those positions is difficult. What are the indicators that demonstrate whether the volunteer had a rewarding experience and made a

real contribution to the community? In each of these cases, there is output that must be measured with indicators of success rather than bottom-line numbers.

In planning/allocations, measuring the number of dollars that we allocate to community services is easy, but measuring the quality of the services being offered to the community is more difficult. Counting the number of programs being offered is easy, but measuring the efficiency of service delivery is more difficult.

What are the benefits of implementing this principle of measuring output rather than input? Identifying and tracking our key objectives serve as critical management tools. Written and publicly shared objectives (output) enable us to say “no” to good ideas that don’t advance our mission. They give us meaningful criteria to be used for performance evaluations of staff. They also assist us in achieving a better “return on investment,” a business concept that serves us well in our environment of consistently limited resources. Finally, a marketing strategy that focuses on the broad range of impacts that federations have in the community would be more successful with new target audiences who don’t understand how the community campaign relates to their lives.

2. *Getting the right people on the bus.* In order to build great organizations, we must ensure that we have right people on the bus, the wrong people off the bus, and the right people in the key seats before we can figure out where to drive the bus.

In the federation world, we often pay lip service to the notion that our staff is our most precious resource, and we are continually talking about recruitment and retention, performance evaluations, succession planning, and compensation issues while we create yet another task force, committee, and report. The literature on the topic of managing our human resources is extensive. Similarly, the difficulty with recruiting and retaining qualified volunteers is well documented.

If we have identified what the challenges are, why is it that we seem unable to get a handle on them? Simply put, we must stop running our federations as if they were family businesses or social service agencies. We must manage our human resources with rigor, in a disciplined and coherent manner. We can still be fair and subscribe to Jewish principles while being rigorous—these are not mutually exclusive concepts.

Below are some ways in which we can get the right people on the bus, the wrong people off, and the right people in the right seats.

Getting the Right People on the Bus

Appeal to people's idealistic passions. As Collins points out, the number one resource for a great social sector organization is having enough of the right people willing to commit themselves to the mission. In the federation world, we sometimes lose sight of this factor or we take it for granted. When seeking and hiring new staff, we must ensure that we properly promote and market our mission. We are not just hiring a production manager in a marketing department. We are hiring an individual to join the Jewish federation world, with all that this entails. Could most of our employees even describe the mission of their federation, much less of the federation movement? We are missing out on a great opportunity, and all marketing and promotional materials aimed at recruiting employees should appeal to people's idealistic passions.

The same considerations should apply to our volunteers. How many times have we overheard the complaint that a particular meeting created a "them versus us" mentality? There should be no "them versus us" once we have all the right people on the bus.

Make the process selective. The more selective the process, the more attractive a position becomes, even if the pay may be lower than in the private sector. Securing a position at a federation should be perceived as highly desirable. Formalize and institutionalize your selection process with proper job descriptions, selection criteria, reference checks, and accepted HR practices. Make your screening and evaluation process highly rigorous, even if it means taking longer to find the right staff member. You should never feel as if you have "settled."

Encourage decision-making. Great organizations, both not-for-profit and businesses, have nurtured an environment in which critical decision-making is encouraged at all levels and where all engaged in the enterprise of the organization view themselves as "owners."

Getting the Wrong People Off the Bus

Employ early assessment mechanisms rigorously. In the social

service sector, where getting the wrong people off the bus can be more difficult than in a business, early assessment mechanisms turn out to be more important than hiring mechanisms. Use probationary/early assessment periods consistently and fairly. It is much easier to deal with a “bad fit” or hiring mistake early on in the relationship than later. It is never easy or pleasant, but as we all know, having the wrong people on the bus can severely hamper the effectiveness of the enterprise. The same standards must also apply to our volunteers.

Deal with your problems! If you have a problem or underperforming employee, deal with it. Do not hope that the problem will go away—it won’t. Seek assistance. Be humane, be fair, but deal with it! Similarly, don’t ignore the importance of cultivating a knowledgeable and enthused volunteer base. A volunteer with an axe to grind or one who is not thoroughly familiar with the federation and the way in which it operates can cause considerable damage, affecting client participation, donor confidence, and staff performance and cohesion.

Get the Right People in the Right Seats

Identify your key positions and make sure that you have the right people in them. You may have perfectly good and competent people in your key positions, but are they the best people out there? If not, you should continue to seek the best person for the job. If you aspire to be a great federation (and shouldn’t we all?), you must take steps to ensure that you have great (not just good) people in your key positions. This may involve encouraging people to move from positions that they currently hold to other positions within the organization. This is perhaps the most difficult challenge of all those presented in this section.

Great organizations must also consider succession planning. We must constantly train and support the next generation of great staff and volunteer leadership, provide suitable mentors, and create opportunities for advancement.

In summary, we need to continue to formalize and institutionalize sound human resource practices. We must become rigorous and consistent in our hiring, assessment, and placement of staff. We should never feel as if we have settled for merely good employees or good volunteers. We should actively strive for great

employees and great volunteers, with all the difficulties and potential unpleasantness that this may entail. Creating a great organization is not for the weak of heart.

3. *Getting things done within a diffuse power structure.* Collins theorizes that there are two types of leadership skills: executive and legislative.

Executive leadership is often associated with the business world and is usually defined as the leader who has enough concentrated power to make the right decisions. Legislative leadership is often more associated with the not-for-profit world, whereby the individual leader does not have enough structural power to make and implement such decisions alone. Rather, the leader relies upon persuasion, shared interests, and political currency to create the conditions necessary for the right decisions to be made.

In a business environment, the impact of the CEO's power lessens due to regulatory requirements and board interactions. In the federation environment, this "erosion" is exacerbated by the additional involvement of donors, grantors, and numerous other stakeholders as well as the desire to achieve consensus. That being said, not-for-profit leaders have learned the different types of power that exist in the absence of concentrated executive power—the power of inclusion, the power of language, the power of shared interests, and the power of coalition.

Collins notes that in today's world, the most effective leaders need a blend of both executive and legislative skills, building "enduring greatness through a paradoxical blend of personal humility and professional will." In this sense, business leaders will need to learn from their counterparts in the not-for-profit world about how to make and implement the right decisions.

In the federation world, it is critical that our professional leaders put a well-articulated mission and vision above all other considerations. Obtaining "buy-in" from board members, agency leadership, community leadership, and large donors is essential in moving the federation from "good to great." The CEO and other professional leaders in the federation world must be extremely adept at pulling all stakeholders in the same direction so that the right decisions are made.

This mission and vision needs to permeate all that we do, from the marketing of the message to building the volunteer and

staff teams to make it happen. At the end of the day, all interested stakeholders in the federation should understand the cause and then support decisions which move us in that direction.

4. *The hedgehog concept: Rethinking the economic engine without a profit motive.* Collins defines this principle as “attaining piercing clarity about how to produce the best long-term results, and then exercising the relentless discipline to say, ‘No, thank you’ to opportunities” that fall outside of it.

In the business world, Collins saw the hedgehog concept as the area where three intersecting circles meet. The first circle is what the organization is passionate about, the second is what the organization can do best, and the third is what best drives the economic engine. In the not-for-profit world, the third circle needs to shift from an economic to a resource engine. A resource engine certainly includes money but also takes into account time and brand.

The challenge for federations is expanding our thinking beyond the money piece of the equation. As stated in previous sections, the success of federations has traditionally been tied to the success of the campaign—the money piece. However, as competition increases and we are forced to examine ourselves and the work that we do, the idea that building community or serving as a community convener for strategic discussions becomes more central. In those cases, we need to redefine our core mission to be about something broader than just dollars—it needs to be about involvement (time) and the role the federation can play in bringing the community together and enabling change (brand).

Ultimately, Collins comes to the conclusion that finding the means to have all three circles connect and reinforce each other is the only way to attain a truly great organization. Federations must understand how the mission ties into the resource engine and how the resource engine reinforces the mission.

One clear example of this principle is the continent-wide challenge we encounter within financial resource development of maintaining, and increasing, the number of donors we have, as well as the level of commitment of each donor. If viewed as simply an economic factor, it leads to certain implications about which message is sent and how the message is delivered. Most often, these implications are the very factors that are driving

younger donors away and making them say that “all we care about is money.” If we change the focus to one of resources, there are subtle, but important, distinctions that occur. Instead of being about raising money, we are about building community or committing time toward a cause they might care about (and our work is broad enough to include almost any cause). As we all know, once you have an individual committed to the cause and giving their most precious resource—their time—they are much more likely to give their money as well.

Within governance, we must find a way to focus our board’s energies on identifying the core mission/competencies of the organization and tuning the entire enterprise toward meeting that focus. Given environmental factors, this may be different within different communities. In some communities, the federation is the central fundraising apparatus; in others, it is a stronger community strategic planning initiator. Since our passion is the same—the support and nurturing of Jewish life throughout the globe—each federation must understand what it provides better than anyone else within the community. Only when we understand the role that we play in moving that mission forward can we tune our resource development toward meeting the challenge.

At the planning/allocations level, we must be clear about our unique role in the community and what we are in a position to influence or make happen. There are many good ideas out there, but a lot of them are good ideas for someone else. We must develop the fortitude to honestly evaluate which ideas are good for our community versus generally good ideas of lesser impact. Once we have identified the ideas that we can use to help move the community forward, we must attach the right resources (in terms of time and talent) and follow them through to the end.

Creating a clear understanding of what we want to accomplish and the resources necessary to make them happen will assist us in becoming the leader in our “industry” and in moving the communal agenda forward.

“Turning the flywheel—building momentum by building the brand.” Collins notes that for great institutions, “there is no single defining action, no grand program, no one killer innovation, no solitary lucky break, no miracle moment.” Like a flywheel, progress inches forward, building upon each action.

The principle contains two main components. Firstly, like a flywheel, the initial turns are slow and take a lot of effort, but building upon the momentum of the last turn, each push becomes easier and the wheel moves faster. With each success, the organization builds momentum. With each turn, we can attract more resources and commitment that will lead to stronger organizations. Secondly, in the business sector when the flywheel is working successfully, businesses attract investors that will invest in the whole enterprise, thereby creating a stronger organization.

In the private sector, when an organization performs well, it can attract capital to support the organization. The current trend in the not-for-profit world, however, is to fund programs, focusing on building programs and not in helping to build great organizations. Will this pattern build great programs or great federations? How can federations attract funds that help support the organization's move toward greatness rather than just specific programs?

At the management/organizational level, “getting the right people on the bus” is important for the team to work together so that one event, project, or program builds upon others to build momentum and create a synergism. This is the team that must slowly push the flywheel forward.

The same is true at the governance level. The federation model is built upon processes and committees that many believe are slow and can’t make giant leaps. These committees should all be working together in coordination toward a shared mission and vision. Each successful committee and process can move the flywheel forward. Successful programs should engage more people, which should result in more dollars to provide for successful programs and projects.

In financial resource development, the collaborative model (the ongoing cultivation and nurturing of donors rather than relying upon the traditional annual campaign model) is consistent with this principle. The collaborative model incorporates the work of various departments, breaking down the functional silos. We are learning that reaching our target donor population is now a slow, person-by-person process of engagement, learning, giving, etc. Our goal is long-term engagement and giving, but we understand that for each person, there is a breakthrough point at which the flywheel takes off faster.

The challenge in this area is targeted giving versus annual campaign-giving. In the early stages of engagement, we may have to connect people with targeted giving and identification with specific programs, while the ultimate goal is to achieve financial support for the whole organization. To reach the ultimate goal of being a great federation, our major donors and funders need to be connected and be giving to the whole enterprise.

In marketing, we need to develop a consistent message or brand to create a sense of identification. One invitation or advertisement does not make people connected and loyal to the federation. A consistent message creates the momentum necessary to push the flywheel forward.

The planning/allocations process addresses both parts of this principle. First, the process of building trust among our recipients is slow and methodical; each success builds upon the last. Great agency/federation relations are not just about the dollars. They are about trust, dialogue, openness, and working together for the benefit of the entire community. As federations build stronger agency/federation relations and align the distribution of funds to mission and vision, we are creating stronger and greater federations.

Conclusions

The principles that make a business “great” rather than good are the same principles that make a federation “great.” Applying these principles within federations presents some unique challenges because we are volunteer-funded and volunteer-directed organizations. That being said, we believe that applying these principles will ultimately produce the same benefits in a social sector organization as they do in a business.

We need to clearly identify our mission and the key output that will accomplish that mission. We need to have a process for moving forward on our key objectives and for saying “no” to projects that don’t advance our mission. We need to clearly describe our successful outputs, what we do better than anyone else in the world, and use these to build our brand. We need to recruit the best staff and volunteers for each position and invest in their professional and leadership growth. We need to advance our agenda within our very challenging power structure that requires highlighting shared interests, building collaborations,

and using political currency to make the right decisions.

The ideas expressed here are not brilliant or extraordinary. Many of them are probably already being planned or implemented to some degree in many federations. So what is our message? In spite of the challenges, if we want to be “great,” we need to consistently apply these principles in all areas of our federations. This *consistency* will take a great deal of discipline, but if we believe that this will make our federations great, why should we settle for anything less? If we encounter resistance, we can always say that we are operating more like a business—a great business!

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Meeting Them Where They're at: Redux

Shelley Horwitz and Andi Milens

Throughout its history, the federation movement has been the focal point in the creation of a vibrant and inspired Jewish community. The federation has been the central force, not only for providing services to the most vulnerable, but just as importantly, for addressing the existential issues of our time. We fought for and helped build a State of Israel that has grown from a refuge for Holocaust survivors into a modern nation making significant contributions to the world community; we mobilized our community to free the Jews from the Soviet Union and resettled hundreds of thousands of refugees in search of a better life in the United States and in Israel.

Today, the American Jewish community is comfortable. We continue to enjoy great wealth and influence. Jewish education programs for children and adults are flourishing. Yet the Jewish community continues to feel besieged by threats, from terrorism, anti-Semitism, intermarriage, and a lack of affiliation. In addition, the demographic picture of the United States is changing. Jews represent less than 2 % of the population, and the community is not growing—neither in real numbers nor as a percentage of the US population. This reality, combined with threats real and perceived, feeds our community's natural inclination to become insular, to narrow our scope and direct our resources inward. However, it is precisely because of these conditions that the Jewish community must be more engaged in the American public arena. Research is beginning to suggest that Jewish communal organizations will have to take a broader worldview if they are going to successfully engage the next generation of Jews. This raises important questions for philanthropic leaders and communal practitioners who must balance pressures both short- and long-term, both within the Jewish community and in our relationship to American society.

The Next Generation

It is important that, if the federation system is going to engage this population of Jews, they understand how they differ from the current generation of leadership. In January 2007, the Pew Research

Center for the People and the Press released a study titled, “A Portrait of ‘Generation Next,’” which examined the characteristics, worldview, politics, and social values of young adults aged 18–25. Like every generation, young people think they are unique and distinct and that they live in more exciting times than previous generations. Of particular note, among the unique features of this generation is the essentially universal use of personal computers, cell phones and the Internet, all of which carry implications for the way the federation interacts with this cohort.

As a group, the Pew study found, these young adults are the most open-minded of any generation on political and social issues such as immigration, race, homosexuality, and intermarriage (Pew, 2007). This is not surprising, as this generation has grown up in a more diverse society and with more interaction between racial, religious, and ethnic groups than ever before. In fact, 47% of today’s young Jewish adults do not have two Jewish parents (Hillel, 2006) and two-thirds of young Jewish adults have mostly non-Jewish friends (Cohen & Wertheimer, 2006). A 2006 American Jewish Committee survey found that young Jews are comfortable sharing Jewish events and space with non-Jews (Ukeles, 2006).

The AJC survey also reports that young Jewish adults in the U.S. “are somewhat less likely to be strongly Jewishly identified than older American Jews” (Ukeles, 2006, p. 3). More Jewish college students identify ethnically rather than religiously as Jews, and most are interested in social justice. They seek opportunities to be both distinctively Jewish and universally human (Hillel, 2006).

In a 2005 study of the Jewish identity of participants in Jewish cultural events in New York City, Steven M. Cohen and Ari Y. Kelman found that young Jews find that their Jewishness actually emerges in the company of non-Jews, and they seek out integrated environments in order to express their Jewishness. They are seeking Jewish lives that put Jewishness in conversation with other cultures and Jewish individuals in conversation with other people. In fact, in some instances, their Jewishness actually emerged in the interaction with the other (Cohen & Kelman, 2005).

Jewish young adults, report Cohen and Kelman, are seeking Jewish engagement but are unaffiliated with traditional Jewish

institutions. It is important to note, however, that the fact that they are unaffiliated need not imply that they are “Jewishly apathetic.” They are interested in creating social and professional networks, not necessarily formal communities. This trend comes in parallel to a shift in the general culture, as the American Jewish Committee survey also reports:

“Jewish culture, like the culture of young people in the general community, is increasingly bottom-up, self-generated, and decentralized... young people are creating their own identities and patterns of association, leading to [the creation of] ‘quasi-communities’ built around common interests and shared interests, rather than around institutions and organizations” (Ukeles, 2006, p. 3).

Unlike traditional Jewish organizations, these networks are “flexible, episodic, and erratic, following the logic of diversity and tolerance that their members value” (Cohen & Kelman, 2005, p. 8).

What are the pressing issues that will engage young Jews today? How can the federation maintain its central role in nurturing a Jewish community that is both inspiring and inviting to the next generation of Jews, who can act on their ideals through any vehicle they choose?

Israel

If I forget thee, O Jerusalem, let my right hand wither, let my tongue cleave to my palate if I do not remember you, if I do not set Jerusalem above my highest joy. (Psalm 137, 5–7).

Studies have shown that American Jewish support for Israel is not universal. The coming generation of Jews never lived in a world without the State of Israel. It does not relate to Israel as a burgeoning democracy struggling for survival and as a refuge for Jews fleeing oppression; it lacks the same identification with Israel, and large segments struggle with the political realities of Israel.

According to a 2005 report derived from the 2000–01 National Jewish Population Survey (NJPS), “Israel Connection and American Jews,” only 35 % of Jews age 18–34 have traveled to Israel (Ament, 2005). Steven M. Cohen, in a poll released in the spring of 2005, found that American Jewish attachment to Israel had weakened measurably in the previous two years, even while he found no decline in other measures of Jewish identification,

such as religious observance or communal affiliation. As a component of personal Jewish identity, “caring about Israel” mattered a lot to only 48 % of respondents, down from 58 % in 2002, and only 57 % agreed that “caring about Israel is a very important part of my being Jewish.” This was down from 73 % in 1989. Cohen’s survey also found that “as many as 37 % agreed that they were ‘often disturbed by Israel’s policies and actions,’” while only 33 % disagreed with that statement (The Forward, March 4, 2005).

One successful response to this disturbing trend is Taglit-Birthright Israel, which has taken tens of thousands of American Jews to Israel, and like other programs such as Otzma and Partnership 2000, has the potential to give young Jews an Israel experience on a visceral level. Initial studies indicate that Birthright Israel makes an impact on Jewish identity and connectedness. However, the federation system is only beginning to consider appropriate and attractive ways to engage Birthright Israel alumni.

Beginning with the last intifada, as promoting and supporting pro-Israel advocacy on campus again became a central concern for the organized Jewish community, many students who identify as pro-Israel report feeling pressured to conform to certain political views about Israel or risk being disparaged and, in the extreme, of being labeled as anti-Israel. They feel that any disagreement with or questioning of the “party line” leaves them marginalized. Cohen and Kelman report:

“When they spoke about Israel at all, they spoke of moral complexities and ethical shortcomings. For some, pro-Israel advocacy in the organized Jewish community constitutes an impediment to affiliation. Their concerns about conventional Jewry entail not its support for Israel per se but specifically endorsement of ‘right-wing pro-Israel’ positions and policies (Cohen & Kelman, 2005, p. 11).

By its actions, either real or perceived, the federation risks missing an opportunity to engage a segment of the young Jewish population that cares deeply, even if perhaps differently, than does federation leadership. Young Jews do not stay away from Jewish communal institutions simply because they are averse to joining organizations or making commitments. They have no interest in being involved in organizations they feel do not represent their views or make them feel welcome. The federation system must

demonstrate an understanding that differing opinions do not necessarily reflect a lack of support. If the federation is going to maintain credibility and relevancy to the coming generation, it is going to have to enable community members to wrestle with Israel issues in an open and welcoming environment. Such conversations, which have, in some cases, taken the form of a town hall meeting, are not simple, should be planned with great care, and should stay “within the family.” Although there is some risk that these conversations may be heated, and at times contentious, providing such a space for a variety of viewpoints will go further toward strengthening the Jewish community in the long term. The Boston Jewish Community Relations Council has sponsored ten town hall meetings over the last two years. The sessions have become less heated, and community members have consistently expressed their appreciation that the JCRC provides a place that they can be heard. A federation that demonstrates its willingness and ability to listen to multiple mainstream voices in the community will be far more attractive to the younger generation.

Social Justice

Our Rabbis taught, “Give sustenance to the poor of the non-Jews along with the poor of Israel. Visit the sick of the non-Jews along with the sick of Israel. Bury the dead of the non-Jews along with the dead of Israel. [Do all these things] because of the ways of peace.” (Babylonian Talmud, Gittin 61a).

As the disparity between rich and poor in our country and around the world grows, young Jews are consistently telling us that social justice is an issue they care about deeply. In the U.S., the images from the aftermath of Hurricane Katrina and the flood that devastated New Orleans penetrated the consciousness and seared the conscience of the American public. Like all Americans, young people were shocked by what they saw and felt compelled to respond. Hundreds of university students gave up their vacations to go to the Gulf Coast to rebuild destroyed communities. It was a profound experience for those who had never before encountered the breadth and depth of such entrenched poverty in America.

The growth of globalization and access to instantaneous world news has made our world a much smaller place and made

this generation feel more connected to people and events around the world. Awareness of poverty, inequality, and injustice has become pervasive and unavoidable. Images of extreme poverty and hunger in Africa are broadcast around the world as celebrities such as Bono and Angelina Jolie command the attention of the media like never before. Other popular culture icons such as The Gap are bringing attention to global issues like the spread of AIDS or human trafficking.

In 2002, Amos: The National Jewish Partnership for Social Justice commissioned a study of American Jews and their social justice involvement. The study clearly found strong support for social justice across the Jewish community (Cohen & Fein, 2002). More than religious observance and support for Israel, survey respondents identified social equality as most important to their Jewish identity. More than 87% believe that Jews have a responsibility to work on behalf of the poor, the oppressed, and minority groups, and 94% feel proud to be Jewish when Jewish organizations engage in social justice work. Eighty-five percent believe Jewish federations and other organizations should sponsor more social justice programming, and 82% feel that Jewish federations and other Jewish organizations should actively engage in helping to shape public policy and social justice (Cohen & Kelman, 2005).

The Amos survey also found that 89% of respondents value “making the world a better place” as meaningful. In addition, helping the underprivileged, working for social justice, and contributing to charities in general were also deemed meaningful by a majority of respondents. Thus, the survey concludes, “if social justice commands as much interest and significance as the data indicate, it behooves organized Jewry to invest in social justice work, just as it has previously turned to spirituality and Jewish learning” (Cohen & Kelman, 2005, p.45).

For more than a decade, the federation movement has poured tens of millions of dollars into Jewish education and other continuity initiatives. Those programs have successfully engaged many in our community in day school and adult education. Among the values we have imparted is that of tikkun olam, repair of the world. As John Ruskay, executive vice president and CEO of UJA-Federation of New York has stated:

“One of the reasons we seek to strengthen Jewish identity is

because a core teaching of Judaism is that we are all created in the ‘image of God.’ And we make these words real by supporting human-service agencies in New York that care for all New Yorkers—Jews and Christians, black and white, gay and straight, American-born and immigrant.”

Many young Jews have learned that lesson well, and now they’re looking for ways to engage. The federation system should capitalize on this success. Programs like Nechama, Otzma, and the American Jewish World Service are growing by leaps and bounds. Most recently, the Schusterman Foundation/Campus Leadership Initiative-sponsored “Leading Up North” trip saw 3,000 applications for 300 spots to travel to Israel to rebuild communities damaged by Hezbollah attacks. Nechama has sent 600 volunteers to the Gulf Coast to rebuild communities destroyed by Katrina; by the end of April 2007, Hillel will have sent more than 1,600 college students to the Gulf Coast on alternative break programs. MTV is filming a JNF-sponsored alternative spring break trip to Israel for a feature segment.

The next generation’s interest in social justice is not, however, solely in hands-on social action projects. They want to effect change. Many are interested in socially responsible investing, integrating their personal values and societal concerns with investment decisions. The same can be assumed about their charitable giving—they want to give their charitable dollars to organizations that are addressing the issues they are passionate about.

Young Jews also want to give their time and money to institutions and programs that serve the general community. They have grown up in a diverse society and in diverse households, and they are much less parochial than their parents’ and grandparents’ generations. They want more than the standard assurance that the dollars that the federation gives to its social service agencies serve non-Jews in addition to Jews. For them, the issue is poverty in America and around the world, not just Jewish poverty. There is a growing menu of organizations that speak to their desire to tackle general societal issues. Many of them are seeking to do so through Jewish organizations. If the federation seeks to engage the next generation of Jews, it will have to give them the vehicle through which to act on their passions, or be a major force in supporting other Jewish organizations that do.

Energy and the Environment

The earth is the Lord's and all that it holds/the world and its inhabitants. For the Lord founded it upon the ocean/set it on the nether-streams. (Psalm 24:1–2).

The environment, including everything from global warming to sustainable development, is an increasingly important issue in the Jewish community. Since the publication of *Silent Spring* in 1962 and the establishment of the Environmental Protection Agency and celebration of the first Earth Day in 1970, the environmental movement has grown exponentially. Today, from the release of *An Inconvenient Truth* to the publication of the “Climate Change 2007” report of the Intergovernmental Panel on Climate Change (IPCC) to the federal government’s focus on energy security, energy and the environment have become critical priority issues. Whether the concern is our nation’s security and reducing dependency on foreign oil, excessive consumption of fossil fuels, or the emission of greenhouse gases and climate change, there is no denying that the environment is a crucial issue facing the next generation and their children. The Pew study reports that the next generation feels strongly about protecting the environment, including supporting stronger laws and environmental regulation, even in the face of potential higher consumer prices and job loss.

International Hillel recently sponsored the Charlotte B. and Jack Spitzer Forum on Social Justice, with sustainability and the environment as its primary concern. The Spitzer Forum and the concurrent annual Plenum of the Jewish Council for Public Affairs were both “green” conferences. For very little cost, both conferences purchased carbon offsets, used to neutralize the carbon dioxide output of the conferences. The Spitzer Forum recognized the primacy of this issue to its constituency. Spitzer’s emphasis on sustainability reflected Jewish students’ growing interest in this area.

Other evidence of the Jewish interest in the environment can be seen in the enormous success of a program of the JCPA’s Coalition on the Environment and Jewish Life (COEJL): A Light Among the Nations. This national program encourages institutions and individuals around the country to install energy-saving compact fluorescent light bulbs. The campaign has touched 50,000 people, as well as many synagogues, communal institu-

tions and organizations. In Pittsburgh, the federation's Community and Public Affairs Council sponsors the Homewood Squirrel Hill Redd Up Coalition, a litter clean-up coalition between a Jewish neighborhood and an African-American neighborhood. The project has attracted many people who were never before involved in the federation. In these simple ways, federations can send a message to young Jews that they are willing to take action and demonstrate leadership on this critical issue.

The environment is a pervasive issue that is gaining momentum across the country, and it offers the potential to mobilize those in our community concerned about our future. The federation movement can embrace the issue of the environment as one that attracts and motivates young people, or it can abdicate its potential role to the growing number of organizations, Jewish and non-Jewish, attracting increasing numbers of young Jews who want to know that the institutions they devote their time and money to are cognizant of and care about environmental issues. The federation should embrace the growing movement of "green" buildings and conferences and expect that its funded agencies do the same. By this one action alone, young Jews will see the federation as engaged in one of the most pressing issues of their generation.

International Human Rights

You shall not stand idly by the blood of your neighbor.
(Leviticus 19:16).

There is, perhaps, no more obvious issue that requires the voice of the Jewish community than that of international human rights. Our community has a long history of being persecuted, of being expelled from our homes, of being denied our basic freedoms, and of being victims of genocide. Thus, the Jewish community, perhaps more than most, understands the need for strong moral voices to speak out on behalf of the oppressed.

The federation movement has already demonstrated its ability and willingness to respond to international humanitarian crises by mobilizing the Jewish community and bringing its substantial resources to bear. The end of the Holocaust saw a massive relief and resettlement effort of hundreds of thousands of refugees. The 1970s and 1980s brought an unprecedented advocacy movement to successfully free millions of Soviet Jews.

Jewish leadership has not been limited to aiding Jews in crisis. The Jewish community has consistently responded to humanitarian needs around the world. The federation system has provided shelter to refugees from Cambodia, Vietnam, and Tibet, among others. Monetary and human resources have been sent to aid survivors of natural disasters from El Salvador to Sri Lanka. Muslims have been airlifted from ethnic cleansing in Bosnia.

But not since the Soviet Jewry movement has our community been so mobilized on an issue of universal human rights as it has been on the genocide in Darfur. We have recognized and acted on our unique obligation to fight for those who are victimized by tyranny and oppression. The Jewish community has raised its moral voice, and U.S. government leaders have heard.

It is young Jews who, whether through Jewish or general community organizations, have been at the forefront of the Save Darfur movement and the fight against other human rights violations around the world. They have demonstrated their commitment, and they are looking to the organized Jewish community to continue to exert its considerable influence. The international human rights agenda presents a natural opportunity for the federation system to harness the energy, enthusiasm, and caring of future generations.

Conclusions

One of the most common misperceptions of the federation is that its sole purpose is to raise money and that its interest lies only in engaging those who can contribute significantly to the annual campaign. Of course, raising the funds needed to support the Jewish community and its pursuits is fundamental; thus, federations have made the strategic decision to focus resources on raising more funds from major donors and on cultivating their children. The result, however, is a shrinking donor base and an agenda that is set more and more by fewer major donors. That strategy may raise more dollars in the short term, but it puts the federation system at risk. Wealth may continue to be passed on from generation to generation, and that wealth may grow. UJA-Federation of New York, through its Emerging Leaders & Philanthropists (ELP) program, has sought to capture a specific segment of this population through targeted cultivation of the children of wealthy donors. ELP offers an array of innovative out-

reach and programming geared toward long-term engagement.

But the interests of those succeeding generations may or may not continue to align with those of the current stakeholders. The federation will be best served in the long term by engaging the community and thus broadening its base. Both strategies are important. Today's federation leadership must find a way to balance them.

The nature of the interaction between the federation and the Jewish community has changed. Young Jews want to make a difference in the world we live in—in the Jewish community and in the world at large. If the federation system is to continue to flourish and to be the place where Jews act on their passions, it must harness that energy and demonstrate leadership on the essential issues of our time.

The next generation of Jews doesn't need a "Jewish community" in the same way their parents and grandparents did. All doors—social and philanthropic—are open to them. They are much more comfortable with their place in society. For them, the need to gravitate toward the Jewish community is much less than previous generations.

Increasing numbers of young Jews come from intermarried families, showing less identification as Jews. Less identification as Jews means less connection to the organized community. The federation movement is in danger of losing relevance to the coming generation. The federation isn't cool—it's stodgy. The federation system is going to have to find ways to speak to the interests and aspirations of the next generation and give them a place to connect. To this end, the Jewish Council for Public Affairs is developing an initiative: to work with Jewish Community Relations Councils around the country, building local cadres of Jewish activists working to better the Jewish and general communities.

The federation system must also recognize that if it wants young Jews to engage, it must be prepared to welcome a multitude of viewpoints. Diverse ideas enrich our community; we should embrace rather than shrink from them. If the federation system is to continue to thrive, it must be open to new voices and new directions.

The federation must create multiple access points for young Jews. This requires broadening our definition of connectivity and

affiliation. Federations have traditionally recognized Jewish Community Centers, synagogues, and Hillels as gateway institutions. We need to be more inclusive and embrace more non-traditional portals. UJA-Federation of New York has demonstrated leadership and innovation in this area, providing, for example, funding for cultural entryways such as *Heeb* magazine and the Six Points Fellowship, which supports individual artists in the New York area who want to develop new projects with a Jewish focus, theme, or element. There are myriad innovative entrepreneurial programs and institutions that are attracting young Jews—Isaac and Ishmael, Teva, and Hazon just to name a few—and some federations have recognized the value of working with them. A ready-made vehicle already exists within the federation system—the Jewish Community Relations Council. JCRCs around the country are engaging in work with the general community on the issues raised here. It is important that the federation acknowledge the role these organizations play and to embrace and support these organizations.

In addition, since the NJPS announced in 1990 that 52 % of Jews were intermarrying, the federation has focused its community-building energies on strengthening Jewish identity. Thus, hundreds of millions of dollars have been spent on formal and informal Jewish education and synagogue initiatives. A by-product of this has been the perceived necessity and the inclination to focus only on “Jewish issues.” How the federation defines a “Jewish issue” could well determine how it relates to the coming generation of young Jews.

It is tempting for the Jewish community, in the face of attacks on Israel, rising anti-Semitism in Europe, and flat or decreasing annual campaigns, to limit its focus, narrowing its definition of a Jewish issue to only those that it believes directly affect the Jewish people. Certainly Jewish education, continuity, and providing services to Jews in need are at the core of the federation’s mission and should remain so. However, in light of what recent research suggests, focusing solely on the needs of the Jewish community all but guarantees that today’s federation may hold little interest for the majority of the coming generation. The next generation of Jews cares about the general world in which it lives. The federation system, of course, through its beneficiary agencies, will con-

tinue to provide services to Jews and non-Jews alike. But the federation itself should increase its engagement in issues that promote the good of our society and our world, not just the Jewish community, as it did by its response to Hurricane Katrina and by advocating for Naturally Occurring Retirement Communities (NORC) funding. This builds good will for the Jewish community as a whole and will attract new young Jewish leadership. Previous generations had limited options for civic engagement. The coming generation of leaders has a multitude of choices and less interest in organizational affiliation. For the federation to attract them, it is going to have to “meet them where they’re at.” And where they’re at is a broad view of the world and their place in it.

There are those who would suggest that this takes the federation far from its core mission. However, the federation’s responsibility is to raise funds to assist those in need, to support Israel, and to build community—interrelated components of the same end goal. All of these facets contribute to the strength of the federated system and its centrality to Jewish communal life.

Even while the federation is intensifying efforts to cultivate major donors and their children—and despite the perception that the federation is an elite organization—it is crucial that the federation continue efforts to engage an increasingly diverse Jewish community. In addition to its unparalleled social service network, what has distinguished the federation movement has been its leadership on the survival issues: Israel, civil rights, and Soviet Jewry. The federation must demonstrate moral leadership on the issues of our time to remain relevant to the next generation of Jews. The federation must give them the ability to be simultaneously distinctively Jewish and universally human.

As an organization with the power to bring together broad segments of the Jewish community, the federation can demonstrate leadership by exercising its traditional role as convener, enabling community agencies and organizations to act, each individually contributing to the collective. The federation need not be the implementer; rather, it must be seen as the primary supporter, providing the philosophical and financial backing necessary to impact the key issues that motivate Jews today.

As federations grow increasingly concerned about weakening

ties between the next generation of Jews and traditional communal institutions, now is the time to give that population a reason to engage by aligning priorities with current global realities. The time has come for the next paradigm shift.

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¹ The data for the 2000–01 NJPS were collected before birthright Israel became a significant factor in travel to Israel for young Jews. In addition, it should be noted that of those who travel to Israel, significantly more are Orthodox and thus predisposed to travel to Israel.

Major Threats and Opportunities for the Federation Agenda: Demographic and Social Welfare Trends of Key Importance for the Jewish Community

Jennifer Rosenberg

Abstract

Recent assessments of the Jewish future that focus on geopolitical developments, Jewish identity, and Jewish unity have overlooked trends in demographics and social service delivery that profoundly impact the Jewish people in North America and around the world. The continued strength and vitality of the Jewish people depends on how we respond to these threats and opportunities, which include increasing longevity, increasing economic wellbeing, continuing poverty in some population segments, increased diversity within and beyond the Jewish community, and changing methodologies for addressing human needs and enriching Jewish life. By responding through service delivery, community building, public policies, and legislative advocacy, the Jewish community can address the threats and opportunities these developments present, retaining and even enhancing the vibrancy of the Jewish people now and into the future.

Keywords: *aging, poverty, diversity, human services, community building.*

The strength and vitality of the Jewish people, now and into the future depend on a variety of forces, both internal and external. Some of these pressures have been building subtly and have not been noted in recent articles and publications assessing the challenges facing the Jewish community. There is a tendency to focus on the serious geopolitical developments of recent years as well as shifts relating to Jewish identity and Jewish unity. See, for example, the annual assessments published in recent years by the Jewish People Policy Planning Institute (2004, 2005, 2006), a global Jewish think tank established by the Jewish Agency for Israel.

However, demographic and social changes can also have profound implications for the organized Jewish community in North America, Israel, and around the world. In developing recommendations for what should be on the Jewish communal agenda, we cannot ignore the challenges and opportunities that are emerging from the following trends.

Increasing longevity and the expansion of the senior population, which result in an unprecedented cohort of vital older adults living healthy, active lives and able to contribute in new ways to the Jewish and general community, as well as increased prevalence of chronic illness and other economic, physical, social, and spiritual challenges of old age that will challenge communal resources.

Increasing economic and social wellbeing, which result in the need to help people who are not “needy” in a traditional sense and to acknowledge and address life challenges that often cause despair and alienation. Individuals and communities confronting challenges such as illness, special needs, disabilities, addictions, abuse, and trauma can benefit from and strengthen Jewish community in the process.

Continuing poverty in significant population groups in the Jewish community, which results in hardship, particularly for children and seniors and which requires targeted interventions to empower affected and at-risk individuals and families and to address social and economic factors.

Changing family structures and increased diversity within and beyond the Jewish community, which require us to think about the cultures and assumptions of our institutions in order for us to maintain and enrich our communities.

Changing methodologies and conceptual frameworks, which result in profound changes in service structures and approaches to addressing human needs and enriching Jewish life.

These developments raise crucial considerations for federations, foundations, agencies, synagogues, and communities. By responding through service delivery, community building, public policies, and legislative advocacy, the organized Jewish community can address the threats and opportunities these trends present, retaining and even enhancing the vibrancy of the Jewish people now and into the future.

Each of these trends and their implications will be examined in detail below and will include recommendations for action.

1. Increasing longevity and the expansion of the senior population

Longevity continues to increase in most developed countries. In the United States in particular, as the baby-boom generation ages, the expanding older-adult population is expected to create unprecedented and dramatic shifts in economic and social forces. The size of the older population is expected to double over the next 30 years, and currently, the population aged 85 and older is the fastest-growing segment of the older population (Federal Interagency Forum on Aging Related Statistics, 2000).

The Jewish community is aging at a faster rate than the general population—the portion of the total population that is older than age 65 is 12 % for all Americans but 19 % for American Jews (United Jewish Communities, 2004); in New York City, the difference is even more pronounced, with 11.7 % of the city population 65 years and older, but 21 % of the city's Jewish residents 65 years and older. In the eight-county New York area, there are close to 300,000 Jews over the age of 65 and nearly 425,000 baby-boomer Jews currently in their forties and fifties who are approaching the traditional age of retirement (UJA-Federation of New York, 2004).

In Israel, life expectancy has risen by almost 12 years for males and 13 years for females since the establishment of the state. Although the country's high fertility rates cause the elderly to make up a smaller part of the population than in other western countries, the rate of growth of the elderly population has been higher than that of the total population. Israel's Central Bureau of Statistics (2004) projects that this trend is expected to intensify over the next two decades.

Need to Redefine “Retirement” and “Aging”

With greater education, wealth, and health than any previous generation, older adults have almost limitless options before them. Aging is increasingly seen as a positive time of life, a chance to spend more time on interests and hobbies, do more volunteering, continue working, or start new careers. In the United States, labor-force participation rates have been rising steadily for those in and approaching the traditional retirement age (65 and older and 55- to 64-year-olds, respectively), and people aged 55 and

older are expected to account for nearly 77% of the increase projected from 2004 to 2014 (AARP Public Policy Institute, 2006). In the New York Jewish community, 26% of those aged 65 to 74 and 15% of those aged 75 and older live in households with annual incomes of more than \$100,000. An AARP survey of baby boomers turning 60 (2006) found that they are active and confident, with only 1% seeing age as a barrier to achieving their goals, and virtually all having some substantial life change they hope to make for their personal enrichment and to make the future even better. This creates opportunities that the Jewish community cannot afford to miss. This population has considerable social, intellectual, civic, and spiritual capital to contribute in ways they find meaningful. Maintaining or, in some cases, igniting connection to the Jewish community through the promotion of volunteerism, engagement in educational programs, expansion of community leadership, and a diversity of other substantive and compelling opportunities to connect, inspire, and contribute will benefit all. By approaching seniors as assets and vital participants in the life of the community, all aspects of contemporary Jewish life—families, schools, synagogues, human-service agencies, and beyond—can be enriched. As activity and social engagement also delay physical and mental decline, programs to empower and connect empty nesters and retirees ultimately serve as an important preventive health intervention.

Need to Address Increased Vulnerabilities

Despite all the advances that have been made, it is still true that as people age they are more likely to be affected by illness and disabilities, isolation, and poverty. People are living much longer with chronic, debilitating conditions such as Alzheimer's and Parkinson's diseases. Twenty percent of all seniors in the United States, including nearly half (47%) of those aged 85 and older, report having difficulty going outside the home due to a disability (U.S. Census Bureau, 2004). AARP studies show that the vast majority of seniors want to remain in their own homes, but most homes and communities in which people are aging were neither designed nor intended to meet the needs and challenges to daily living that come with old age.

Issues also arise with caregiving. Over 78% of chronically disabled elderly receive their primary care from family caregivers—

children and spouses who provide unpaid care to relatives and loved ones (Spillman & Pezzin, 2000). The approximate economic value of this care is \$306 billion annually (Arno, 2006). There are significant physical, social, and spiritual needs of elders and their caregivers, more of whom themselves are seniors who, as 55-year-old children, care for their 85-year-old parents. Although family caregiving can be a fulfilling experience, half of all family caregivers suffer from feelings of isolation and feel that the burden of their caregiving is too much for them to handle. They report having difficulty finding time for themselves, managing emotional and physical stress, balancing work and family responsibilities, keeping the person they care for safe, talking with doctors and other healthcare professionals, and making end-of-life decisions, and they lose wages and professional opportunities due to the time demands of meeting their caregiving responsibilities (United Jewish Communities, 2005). A separate but related fact is that the number of labor-force participants aged 16 to 19 and 35 to 44 is projected to decline between 2004 and 2014, by which time people aged 55 and over may account for one in five labor-force participants (AARP Public Policy Institute, 2006). Low-paying government reimbursement to health and social service agencies may translate into increased difficulty hiring adequate staff for the growing number of frail elderly in need, forcing even greater reliance on family caregivers.

A significant portion of seniors live alone, increasing their vulnerability. Older people who share a household with someone else have much more immediately accessible physical and psychological support. In the eight-county New York area, an estimated 82,400 Jewish seniors live alone, and among those who are 75 and older living alone, 44 % do not have an adult child living in the area (UJA-Federation of New York, 2004). In Israel, 25 % of seniors live alone, though, fortunately, 98 % of Israeli seniors have family and 73 % see their family at least once a week (Central Bureau of Statistics, 2004).

Another problem is financial: Many seniors are not adequately prepared financially for retirement, and seniors are a significant portion of the population living in poverty (see section 3, p.80). Although older people with high incomes have a diversity of resources to support themselves (with earnings, pensions, and

assets), Social Security remains the most important income source for older people; for those earning less than \$10,000, 85 % of their total income comes from Social Security payments (AARP Public Policy Institute, 2005). An AARP Foundation survey of women aged 45 and older (2006) identified the prevalence of “false confidence” in respondents about their financial situation—although six in ten people felt confident that they will have enough money to enjoy life in their later years, the majority (62 %) did not have a long-term spending plan for when they retire, and less than half (41 %) follow through with plans to save part of their monthly income toward retirement.

At the same time as, the Jewish community considers how best to respond to longevity trends relating to vibrancy, these significant issues relating to vulnerability require serious attention in the realms of policy advocacy and service delivery. Services and supports for the chronically ill and their caregivers, providing supports in Naturally Occurring Retirement Communities (NORC) or developing enriched housing to enable people to age in place, making Jewish communal institutions physically accessible, reducing isolation, and addressing financial vulnerability are all needed. The impact of increased longevity clearly requires a revolution in the ways our communities engage, plan, and program with and for their older members.

2. Increasing economic and social wellbeing

Overall wellbeing is increasing in most developed countries. According to measures of economic welfare, education, health, and other factors, society in general in the United States, Israel, and many other places with significant Jewish populations is on a continual upward trend. For example, the United Nation’s Human Development Index (HDI) for Israel rose from 0.795 to 0.915 from 1975 to 2003, and the US HDI grew from 0.867 to 0.944 in that time (2005). People can anticipate being wealthier, healthier, and better educated than their parents’ generation. A significant majority of the Jewish population is financially secure if not wealthy, and there is a multiplicity of institutions—long-standing and newly emerging, Jewish and general—to address Jewish interests and needs.

Need to Address Life Challenges Differently

Most Jews are not “needy” in a traditional sense, yet there are issues that everyone faces, no matter where they fall on the economic continuum. Some are a temporary but inevitable part of the human condition (such as illness, bereavement, and developmental stresses); some occur in a portion of the population, affecting individuals as well as their families and communities (such as special needs, mental disorders, disabilities, autism, physical and emotional abuse, alcohol and substance abuse, other addictions, and eating disorders); and some arise from outside influences (such as trauma).

For example, the National Jewish Population Survey (NJPS) 2000-01 found that 16% of Jewish homes have someone with a health condition and half require daily assistance. Jewish families are believed to be similar to the general population in the incidence of special needs (10% to 15% of children) and autism (one in 150 children) (Rice et al, 2007). Twenty percent of Americans suffer from a diagnosable mental disorder sometime in their lives, and 5.4% of adults have a serious mental illness (Office of the Surgeon General, 1999). Studies show that the overall lifetime rate of psychiatric disorders among Jews is not different from the rate among non-Jews, although there are differences in the distribution of specific disorders, including higher rates of major depression and lower rates of alcohol abuse (Yeung & Greenwald, 1992). In Israel, the Prime Minister’s Committee for Children and Youth at Risk (Schmidt Commission, 2006) estimates that 15% of all children in Israel live in situations of risk and distress, suffer from neglect, are exposed to abuse, or live in homes where criminal activity or physical violence between parents takes place. In all of these cases, with appropriate services and supports, the challenges can be alleviated or overcome.

Yet the stigmas attached to many of these situations prevent people from seeking needed assistance. People who see themselves as otherwise “well-off” are sometimes ashamed to acknowledge that they are in need of assistance. We fool ourselves if we think that the impact of these issues just touches individual lives at the margins of society. When one in ten Jewish families are affected by special needs, when 15% of all children in Israel live in situations of risk and distress, and when any of us may confront

wrenching loss in our lives, these issues permeate society at large. The Jewish community's ability to thrive as a people depends—both morally and practically—on how we relate to and address these situations that are in the fabric of our communities' lives.

We are in need of community education and de-stigmatization about the real issues that face people of all social strata. We must provide access to appropriate services through settings where people naturally frequent (through collaborations between social service agencies, synagogues, schools, and JCCs). Co-location of services in hubs of Jewish life is also important because, not knowing where to turn, many people look to their families, their friends, and their religious or spiritual communities when they first experience distress. We also must do more to promote wellness in general (as a preventive measure for some problems and because it is a key factor in individual and communal resilience when other significant challenges arise).

Although services and supports for many of these needs can be found within the general community, they are sometimes more effective when religious, spiritual, and cultural sensitivities are integrated. For example, the Joint Commission on Accreditation of Healthcare Organizations recognizes “the provision of culturally and linguistically appropriate health care services as... a key element in individual-centered care” and establishes as a standard for good care that health care organizations accommodate the right to pastoral and other spiritual services for patients and clients, and that client assessments include religion and spiritual orientation (2006).

3. Continuing poverty in significant population groups in the Jewish community

Poverty continues unabated despite prosperity overall. New York is the epitome of both trends, being the only state in which *both* the median household income and the poverty rate surpassed the national average. Despite economic rebounds, the proportion of city residents who live below the federal poverty level has not changed in the past five years, decreasing slightly among children younger than 18 but increasing among the elderly (Roberts, 2006). In the Jewish community, poverty has increased substantially over the last decade, with one in five Jewish New York City residents living below 150 % of the federal poverty guideline and

close to 350,000 people in eight-county New York Jewish households qualifying as poor or near poor. Most of the Jewish poor in New York are either seniors or immigrants, but 23 % of the Jewish poor are children, primarily in large Orthodox households (Metropolitan Council on Jewish Poverty & UJA-Federation of New York, 2004).

The problem is even more severe in Israel, where the most recent report by the National Insurance Institute revealed a continued rise in the country's poverty rate, with nearly a quarter of the total population (24.7 %) and more than one-third of all children (35.2 %) in poverty—now the highest child-poverty rate among advanced capitalist countries (NII findings cited in Myers-JDC-Brookdale Institute, 2006). The highest increases were among families with children and non-Jews. In addition, 24.4 % of households headed by a senior were living below the poverty line. Much of the increase has been attributed to government cutbacks in child-allowance payments and unemployment benefits. Both in Israel and in New York, part of the poverty phenomenon is that of the "working poor," in which a sizeable portion of the poor population is employed but is not earning enough to support their families. Growth in wages has taken place in the high-skilled industries while increasing less or even decreasing in the low-skilled industries where most poor are employed. Poverty also correlates with such other problems as poor health, lower education levels, higher rates of child maltreatment and other forms of victimization, and less access to needed services, so that the social welfare of people in poor households is at higher risk.

The countries of the former Soviet Union, still in economic upheaval since the USSR's collapse, have started to experience some growth, but incomes remain lower today than they were 15 years ago (Human Development Report, 2005). A significant portion of the Jewish population—elderly people who survived World War II and Nazi atrocities—can hardly survive on their meager pensions and are heavily dependent on support from world Jewry. Prospects are starting to look better for the next generation, but it will still be a long time before things fully stabilize, and in the meantime, disparities between the haves and have-nots are extreme.

Need to Address Both the Economic and Social Factors That Contribute to Poverty and the Capacity of Individuals and Families to Function Effectively

Our tradition acknowledges the persistence of poverty, noting:

“Poor people will not cease to exist within the land, therefore I command you, saying, ‘You shall surely open your hand to your brother, to your poor, and to your destitute in your land” (Deuteronomy 15:11).

Yet one in three Israeli children and one in five Jewish New Yorkers are living at unacceptably high levels of poverty that will be debilitating if they continue over the long term. As population growth in the Jewish community is currently strongest in Orthodox households with children, and poverty is disproportionately found in these large households, present levels may grow if action is not taken. It is critical to advocate for better social safety nets and to look specifically at the most affected populations—large families with children, seniors, and immigrants—to see what policies and programs will reduce current levels of poverty and prevent future generations from being trapped.

4. *Changing family structures and increased diversity within and beyond the Jewish community*

The structure of the family, the basic social unit, is becoming more flexible and varied than ever before. Society in general, and the Jewish community within it, has seen dramatic changes in the norms regarding how families and households are defined. One major contributing factor is changing marital patterns. On one hand, more people are living alone, particularly seniors (the combined effect of longevity and widowhood) and young adults (as the median age at first marriage continues to rise). In Israel, single-person households have risen from 10% to 18% of all households since the 1960s, and of the 325,000 people living alone in 2002, 44% were widowed and 33% were never married (Central Bureau of Statistics, 2006a). In New York, where the median age at first marriage (28.6 for men and 26.6 for women) is nearly the highest in the country, Manhattan stands out with 46% of all adults never having been married (and 35% of all Manhattan respondents to the Jewish Community Study of New York).

Overall in the eight-county area, fully 68 % of seniors who are living alone are widowed.

At the same time, changing marital patterns have also resulted in more diverse families due to divorce and remarriage, intermarriage, conversion, and adoption. Single-parent households today constitute 10 % of all families with children under age 18 in Israel and 3 % of all households (containing 10 % of all children) in the New York Jewish community. In the eight-county New York area, 7 % of couples in which both spouses currently identify as Jewish have one spouse who was not raised as a Jew, adding to the ethnic diversity in Jewish households. Intermarriage characterizes 22 % of all currently married couples in the New York area, ranging from a high of 41 % in Suffolk County to a low of 12 % in Brooklyn. Although statistics aren't readily available on their prevalence, blended families (due to remarriage); committed gay, bisexual, lesbian, and transgender households; and Jewish households adopting children of diverse ethnicities and raising them Jewish (or not) all add to the diversity of our community. Although there has been an overall decrease in multigenerational households, factors including poverty, immigration, and culture lead to households spanning three generations.

In addition, a variety of phenomena are increasing diversity on a larger scale within the Jewish community. Mass emigration from the former Soviet Union changed the face of the communities to which these Jews moved in large numbers. Currently, one in five people in New York City Jewish households lives in a Russian-speaking household. In Israel, 16 % of all households include people who emigrated from the former Soviet Union (FSU) since 1990. Jews from the FSU have also become a very significant proportion of the Jewish community in places like Germany, Canada, and Australia. Israel has always been a country of immigrants from Jewish communities all over the world, but recent years saw particularly large waves of new arrivals from Argentina, France, Romania, and the United States, along with small but steady increases from places like Iran, South Africa, Morocco, India, Bulgaria, Poland, Hungary, and the former Yugoslavia (Central Bureau of Statistics, 2006b). Most significant, however, has been the arrival of the Ethiopian Jewish community—numbering some 70,000—who have faced particular chal-

lenges of absorption. In New York, although nearly three-quarters of Jewish adults were born in the United States, in addition to recent immigrants from the FSU, there are sizable communities with Syrian, Persian (Iranian), Iraqi, and Sephardic Jews. A diversity of grassroots organizations are emerging to preserve and celebrate the unique ethnic heritages of Bukharian Jews; Israelis in New York; and even increasing numbers of Jews of converso backgrounds, who were products of the Spanish Inquisition and practiced Jewish customs in secrecy for generations while formally practicing Catholicism and who are now in the process of returning to Judaism. Both in Israel and in the United States, shifts in denominational affiliation—particularly the dramatic growth in New York's Orthodox population; the population in New York eschewing denominational labels, calling themselves “Just Jewish;” and the small but growing movement of Jewish renewal in Israel that is bridging the longstanding religious and secular divide in the country—are creating vibrant new currents in Jewish life.

Finally, there is the diversity of the societies in which Jews live. In the United States, there was a 16% increase in the number of immigrants living in American households over the past five years; and in New York, continued immigration combined with high birthrates has raised the foreign-born and their children to fully 60% of the city's population. In Israel, the Arab population remains extremely significant, composing 20% of the country's population. Consisting of Muslims (82%), Christians (9%), and Druze (9%), the Arab population has higher fertility rates than Jewish families but has lower life expectancies and higher infant mortality rates, lower rates of high-school graduation and post-secondary education, lower average wages, and higher rates of poverty than the Jewish population (Central Bureau of Statistics, 2005). Due to both Israel's rapid economic development and efforts starting at the height of the intifada to replace traditional Palestinian labor, the number of foreign workers has grown considerably; estimates are around 250,000 to 300,000, of whom about 100,000 are legally in the country, with the majority from Romania, Thailand, the Philippines, West Africa, and Turkey (Israel Ministry of Foreign Affairs, 2001). They are entitled to health and education services, but exploitation is a significant

problem. Economic and social issues relating to these workers and their families raise important issues for Israeli policy and the social fabric of the country.

Need to Change Culture and Assumptions in Service Delivery and of Jewish Communal Institutions So All Are Welcoming Places

Too often, the institutions of Jewish life presume the model of the “traditional” family in their approach to social, religious, educational, and social service programs. Marketing materials, program times, availability of child care, and depictions of model families and practices too often presume homogeneous households of two parents with children. Anecdotally, many people express feelings of alienation from mainstream Jewish institutions due to these factors. But our diversity could be our strength. New approaches to be welcoming and accessible to diverse constituencies could make our institutions more welcoming and accessible to all. Rich traditions and diversity of perspectives can enhance and enliven moribund programs and institutions. Stewarding culturally, religiously, and linguistically competent staff and materials is critical if our institutions are going to reach the people who make up the Jewish community today.

Similarly, our ability to celebrate difference while successfully resettling immigrant groups and assuring success in our educational, economic, and social systems, both within and outside the Jewish community, are critical for our own ability to thrive. How immigrants fare as they resettle, as well as the quality of life of neighbors of all ethnic groups, will influence the stability and future of the Jewish people.

5. Changing methodologies and conceptual frameworks

Shifts in methodologies and conceptual frameworks have begun to create profound changes in service structures and approaches to addressing human needs. It is increasingly recognized that at times of suffering, people not only require a well-integrated continuum of services but also long for the embrace of a caring and compassionate community of family, friends, and neighbors, and even the outreach of strangers.

The more that is learned about the various issues addressed above—poverty, health and mental health, special needs, abuse,

child welfare, and trauma—the more practitioners are convinced that integrated, systemic approaches provide the most effective interventions. The world, these challenges, their impacts, and our coping mechanisms are all complex and intertwined. We are social creatures, so problems in one individual or segment of society almost always affect others, whether they are family members or caregivers, neighbors, or even passersby. For example, in cases of advanced, terminal illness (in which family conflicts and the futures of additional dependents are often entangled issues), outcomes are best not only when the patients receive appropriate medical attention but also when they and their families receive services that address their social, emotional, spiritual, and concrete needs, and when these services are provided by a well-coordinated collaboration of diverse professionals (physicians, nurses, social workers, program staff, and rabbis) and volunteers. The weaving together of multiple networks of service and support, formal and informal, offers the best outcomes.

Spiritual care as a field is still evolving, but there is increased use of chaplaincy and Jewish healing approaches that draw on Jewish texts, traditions, and practices. Medical education and even managed care plans are increasingly beginning to recognize the influence of spirituality and alternative approaches to healing. One study of stress-related response after sustained exposure to terror in Israel found that religiousness, ideological convictions, and social cohesion were associated with substantial resilience compared with response in a secular, metropolitan, and urban population (Kaplan et al, 2005). Much still remains to be learned about the specific and different roles religion and spirituality play in the healing process, but there is growing recognition that they can be important.

In addition, there is a significant transition in best practices within the social service arena that, rather than focus on a community's needs, deficiencies, and problems, engage in asset-based community development, helping communities become stronger and more self-reliant by identifying, mapping, and mobilizing all their local assets. As Robert Putnam demonstrates in *Bowling Alone*, formal and informal networks of individuals and groups produce a valuable and almost tangible asset, "social capital," which correlates strongly with child welfare, education, healthy

neighborhoods, economic prosperity, and health and happiness. One example of this strengths-based perspective is the argument that the Jewish community in New York was able to respond so quickly and effectively to the trauma of the terrorism attacks of September 11th because there was a strong and flourishing network of agencies and synagogues already established long before September 10th. Similarly, when Hezbollah attacked Northern Israel this summer, it was found that where strong community infrastructures were in place, it was possible to act quickly and provide urgent solutions for children and youth. In addition, when official institutions failed to provide safety-net supports, the outpouring of volunteers was enormous and an invaluable resource for aid. Mobilization of community in times of personal, communal, or environmental crisis is not just a matter of having emergency systems in place but is also dependent upon ongoing efforts to build and strengthen resilient communities.

The best strategy for community preparedness is a community-empowerment approach that views community members as partners and capitalizes on various strengths, assets, expertise, and organizational capacity. With the asset-based approach, retirees aren't old folks in need of being cared for and entertained; they are vibrant elders entering the "third age" of life, a period of reinvention and growth, with an unprecedented amount of social, intellectual, civic, and spiritual capital. Teenage boys and girls are not at risk but can benefit from a variety of supports that promote positive youth development, enriching their families and communities. And people with disabilities can be extremely productive and spirited members of our communities with timely and appropriate supports. We cannot look at people solely through the lens of need, vulnerability, or frailty, for these very people are partners in healing, community building, and revitalization, and many are seeking meaningful ways to be involved.

Informed by these trends and also a values perspective, the leadership of the Jewish community is starting to rethink the roles and missions of their institutions. What is caring, and does caring include something more than providing services? Their conclusion: Caring includes and, moreover, goes beyond professional service delivery—it is also how we, as individuals and as part of institutions, care for our family, friends, neighbors, and strangers.

Service institutions are invaluable, especially for members of our community or any community who are most at risk or who are in certain crises. But a powerful caring community that reduces social isolation and calls on people of all ages to partner with others in their own healthy outcomes is also required.

Need to Shift to an Asset-Based, Integrated Approach That Includes Both Concrete Services and Efforts to Foster Resilient, Caring Communities

The way we go about providing support and care not only helps individuals in need; it also strengthens the Jewish community as a whole and the entire society in which we live. Serving all Jews in need—from the most vulnerable to those who simply find themselves in times of distress—and enabling them to thrive and reach their potential results in multiple outcomes. Individuals and families experience a sense of belonging in addition to receiving the formal and informal supports they require. Natural transition points become opportunities for empowerment and deepening connection rather than alienation, as links are made through support groups and collaborating institutions. Others in the community are engaged positively through meaningful opportunities to volunteer their time, making personal and spiritual connections. This has ramifications for Jewish identity, as research has shown that even intensive cultural and educational upbringing can be undermined by emotional turmoil and negative events and experiences (Horowitz, 2000). Similarly, Robert Putnam (2001) writes about how social capital can have both “bonding” and “bridging” effects—mobilizing solidarity and reinforcing identities while providing social and psychological support, as well as encompassing people across diverse social cleavages and fostering links to external assets that strengthen all. The experience of positive dynamics in healthy families and supportive communities strengthens the individual as well as the collective, within and across differences of denomination; social strata; geographic location; Ashkenazi, Sephardi, and Mizrahi backgrounds; and Jews within their larger communities.

Conclusions

There are so many factors that affect the strength and vitality of the Jewish people. Many of the trends discussed here emerged sub-

tly over time but are indeed extremely profound in their implications for the future of Jewish communities in North America, in Israel, and around the world. These trends will have dramatic repercussions for financial and human resources, fundraising needs, and the strength of our communities and institutions. By responding through service delivery, community building, public policies, and legislative advocacy, we can address the threats and opportunities these trends present, retaining and even enhancing the vibrancy of the Jewish community now and into the future.

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Extreme FRD: Taking Financial Resource Development to the Edge and the “Long Tail” of Opportunity

Jim Rosenberg

Extreme. For many, it conjures up notions of doing something risky or way outside one’s capabilities or mission. It creates excitement, but also can create apprehension that inhibits one’s ability or desire to try something different. For those who dare venture to try something new, they are often rewarded. The experience makes it worthwhile, and they are hooked on how great the possibilities can be.

Extreme actions are sometimes necessary. Every once in a while, we need to shake things up, try new approaches, and create a sense of urgency. Pressure is a good thing if it serves to motivate, and it provides growth and renewal if a good plan is in place.

So what does the idea of extreme activity have to do with philanthropy or raising money? Plenty. It’s all about an approach and an attitude as to how we see ourselves as federation professionals, how we view the system in which we work, and how we should work together in order to reach common goals.

Extreme Financial Resource Development (Extreme FRD) takes the idea of extreme activity and applies to it to our everyday work. It creates a set of expectations and sets the bar high for relations with our colleagues, our lay partners, and most importantly, our donors. It is a reminder of why we are in this business in the first place: to provide for the recipients of our services and programs.

We need to think about our approach to FRD in such extreme terms, because if we don’t, we risk losing connections to our greatest resource—our donors. Our donors can be thought of what Chris Anderson (2006) has described today’s world as a “long tail”—a model that describes an abundance of opportunity, all available to us if we just look for it. Without an Extreme FRD approach, we tend to focus only on what Anderson defines as the “head” of the curve, which, in our case, are federation’s core supporters or “insiders,” and ignore the opportunities of connecting with donors not as well known to us found further down at the “tail.”

Extreme FRD can be broken down into five concepts that together help address the needs of our resource development system. Those five concepts are:

- An environment whereby resource development and relationship building exist throughout the federation. No task or job should be separate from that goal.
- A return to what we used to do best: connecting with donors and recognizing the “long tail” of opportunity.
- A strengthening of the “development officer-lay partner-donor” triangle by putting the development officer at the center of the storm.
- Utilization of the annual campaign experience as a community-building tool and as the first step in creating effective Centers for Jewish philanthropy.
- Positioning of federation, campaign, and our agencies as vehicles of trust and integrity.

These concepts, or “calls for action,” set the framework for an effective approach to how we can excel in our jobs. We are all fundraisers. We just don’t know it yet.

Concept #1—Create an Extreme FRD Environment Whereby Resource Development and Relationship Building Exist Throughout the Federation

Before addressing the issues of financial resource development, it is important to establish a context for our work. Why is the federation in business? What is our purpose and how can we align the mission of the federation with what we as professionals are supposed to do each day?

While we do quite a bit, the work of the federation, together with the agencies, can be broken down into two simple ideas: (1) providing for those in need, and (2) community building.

Our goal as professionals is to convince, enable, and mobilize members of the Jewish community to be involved, knowledgeable, and supportive of these two ideas.

But how do we get it done? Between the federation and our agencies, we have various tools, mechanisms, and programs to support these two basic ideas. These various initiatives include: social service agencies, endowments and foundations, volunteerism, annual campaigns, donor cultivation, community plan-

ning, continuity programs, outreach and leadership development programs, fiscal oversight, missions, Israel advocacy, community relations and property management. These activities, plus others not listed, contribute to supporting and strengthening the community and its members.

Ultimately, though, as the federation is the central coordinating body for our efforts and these tools, financial resources are needed to drive this process and allow these tools to succeed. Building and maintaining a community requires dollars; otherwise, programs can't exist. We need the generosity of donors to make our collective dreams come alive, and we need them to feel a sense of passion, commitment, and connection to our mission of providing for those in need and strengthening our community. As professionals, how can we make sure we are doing all we can to help donors feel this way?

The answer is that we all must be involved in resource development and cultivating relationships in whatever we do. No task is separate from that idea, no matter what one's everyday responsibilities are, nor in which area of the system one works.

That concept takes regular FRD to an extreme measure. Financial resource development can and should be part of all of our to-do lists, so that our work is as integrated as possible. And not only do those tools mentioned above help us reach our goals; they also, in turn, provide a variety of FRD opportunities themselves. These opportunities always exist for one to be involved in the business of FRD. The question is: Can we recognize these opportunities and understand that our jobs include working together to bring in more dollars to support the work of the federation and its agencies?

Extreme FRD represents a collaborative and integrated effort of resource development that opens new lines of communication, pushes us beyond our traditional roles, and challenges assumptions. A key ingredient in this is the work of the development officer who, beside the donor, is at the center of the storm in this integrated environment.

Beyond “Total FRD”

Development officers (DOs) come from staff at all levels and all departments, from senior management to line staff, from campaign and endowments to planning and community relations.

Across the organization, they are partners in the work of FRD. Extreme FRD builds on paradigms such as Total FRD, which embraces an integrative approach to working with donors. As Steven Meyers noted in the *Journal of Gift Planning* (2006), fundraisers used to sell “products” to donors without checking in with colleagues or having an overall plan. This caused fragmentation and was driven in part by an individual department’s need to reach certain development goals. Meyers goes on to say:

“These separate staffs just do not live together in the same gift planning space, let alone in the philanthropic space of the donor. In the culture of most fundraising organizations, the intense competition for the donor’s attention so dominates the culture that there can be little or no shared space for the gift officers and lay leaders to work collaboratively, even with the organization’s best supporters” (Meyers, 2006, p. 20).

Extreme FRD builds on Total FRD’s notion of a donor-centered approach, but it extends the idea beyond the traditional walls of the development departments. Not only are annual campaign and endowment professionals talking to one another, but so, too, are professionals in all departments within the federation who interact with donors or potential donors. The approach asks and empowers professionals in non-traditional development departments to be aware of their conversations with donors outside the obvious “philanthropy-focused” topics, in order to note opportunities for further engagement.

If a volunteer who attends a planning department committee meeting speaks passionately about an area of need within the community, the planning professional in attendance can and should play a role in thinking about how that volunteer’s passion can translate into greater involvement with this topic, both in terms of resource development as well as increased participation. Most important, the planning professional will exercise Extreme FRD leadership by not only mentally noting the volunteer’s interest, but by collaborating with appropriate colleagues to move this volunteer along the path of stronger connection with the federation. The entire professional staff should be the eyes and ears of the institution and play a DO role when possible.

Traditionally, federation staff members have been asked to focus on their own jobs and tasks: running events, working on

endowments, administering missions, writing grants, planning for needs in the community, etc. And this is true in many businesses: Do your own job, and you will be fine. Don't worry about anyone else. But this creates isolation in the workplace and reinforces the feeling of working in silos. Extreme FRD promotes an atmosphere that encourages open communication and collaboration among all staff, while alerting them to FRD opportunities in their own backyard. While not every federation professional will be the expert on gift planning or capital projects, or even on annual campaign allocations, all professionals can be experts on the volunteers with whom they interact.

The concept goes back to the notion of being extreme and how the federation can test new approaches and do a little risk-taking, with the ultimate goal of making the “extreme” activities become the standard practice. But for any kind of expanded FRD to be successful, it has to come from the top. Notes Meyers:

“The challenge for top management under the new paradigm seems daunting. In order to allow this more collaborative, integrative gift planning space to take shape, they have to set their sights on building a collaborative, risk-taking culture, along with an organizational structure to sustain it over the long term. At worst, it could be a temporary experiment, but if it produces real results, it could represent a solid new structure for fundraising in other organizations” (Meyers, 2006, p. 21).

The sporting world offers an interesting example of how risk-taking and extreme actions can bring rewards and move new ideas closer to the norm.

The Flying Tomato

Shaun White, otherwise known as the “Flying Tomato,” is the face of extreme sports. A snowboarder, he specializes in what is known as the half-pipe, and won a gold medal at the 2006 Winter Olympics after having won ten medals at the “X Games” since 2002. But a funny thing happened on his way to glory. This 20-year-old from San Diego, who perfected his moves on the mountain as a hobby, has suddenly found himself in the mainstream. In a photograph of him from the Olympics, he is wearing the Olympic logo, an endorsement patch on his sleeve, and an American flag bandanna around his neck. Corporate America and

the Olympic governing body want to be associated with him. And consider this account about him from Rolling Stone:

"In his nineteen years of life on this planet, he's seen snowboarding evolve from outlaw sport to extreme-athletics juggernaut. Not long ago, it seemed like an awkward, pandering idea for the Olympics to have snowboarders at all. Now snowboard events are a highlight of the schedule. Snowboarding, once a good way to get ejected from ski resorts, has gone mainstream. In no small part, that's because of White's shaggy charm and the amazing feats of twisting airborne ballet he can perform with a plank of wood strapped to his feet" (Edwards, 2006 [March 9]).

What made White and his behavior extreme? Undoubtedly, his passion and commitment, his risk-taking, and his experimentation with a sport and technique. He's a medalist at the games, just like all the other winners. Shaun White, with his logos, magazine covers, and television commercials, is now considered mainstream.

But White's experience is not surprising, for the ultimate goal of doing something extreme is to cause it to become the norm one day and go beyond what is expected, so that it catches on and begins to make sense. Extreme FRD helps create energy and a sense of urgency around our goal of building community.

The idea of our work being "extreme" may seem alarmist, but if the goal is to wake us up, then it serves its purpose. It is easy to forget some of the more important reasons why we are successful in the first place. At the top of the list are relationships. They are the key drivers of our work and the "X" factor in the world of Extreme FRD. Without great relationships with donors, our lay partners, or fellow staff, we fail. As has been said and written by many in the past, if real estate is all about location, then resource development is all about relationships. Yet for some reason, perhaps because we live in an electronic world whereby e-mail and voice mail have replaced face-to-face interactions, we have taken this important component of our work for granted. It is time that we rededicated ourselves to relationships and become more aware of the "long tail" of opportunity that awaits us.

Concept #2—Return to What We Used to Do Best: Connecting With Donors and Recognizing the “Long Tail” of Opportunity.

Federations have been incredibly successful enterprises when it comes to resource development. For over a century, we have built an infrastructure of social services and safety nets for those in need, and we have forged partnerships in creating transformational experiences for Jews of all ages. We owe our success to donors, who, along with DOs and lay partners form the Extreme FRD Triangle, form a series of inter-connected relationships that drive our efforts. Donors, specifically the ones who participate in our annual campaigns, are our greatest resource, yet we find ourselves in a changing landscape that has altered our approach to them. We have gotten away from what we do best: building and maintaining relationships with them and connecting them to our core values of collective action and community building. Extreme FRD calls for us to get a better handle on all of our relationships with donors, who really are the DOs’ true clients.

The focus of our attention can be broken down into three groups:

The first group of donors? Our friends, for they are our most important donors and our true inner core, the base of our support. They sit on our boards and our committees, and we go to them when the community needs their help. We count on them for sustaining and growing our campaigns, and we go to them when the Jewish community is in times of crisis. The relationships that our professionals and lay partners have with these donors are some of the most important relationships that exist. But has our focus on them come at the expense of failing to appreciate others?

The second group? Regular, reliable donors who are not connected to us in any real way. They give year after year, perhaps show up at an event once a year, but because we don’t see them in the buildings or at meetings, we really don’t know who they are. They are not officially “anonymous donors,” but we tend to treat them as such. Some give quite a bit, but if we don’t know them too well; we find it hard to get in the door. We have no relationship with them, and all too often, we just assume they will always give. We count on them but have only transactional relationships with them.

The third group is made up of non-donors and others with no connections to us. They are a tough group because either they don't understand or don't like our message, yet this group includes individuals with unbelievable potential. Because we are more concerned with the first two groups, usually because we need them to reach our fundraising goals, we, unfortunately, invest little time or energy in this group.

The three groups make up what is known as the “long tail,” a concept from the business world that has application in our world.

The Long Tail

In his book *The Long Tail—Why the Future of Business is Selling Less of More*, Chris Anderson argues for the existence of a “Long Tail,” whereby a world of niches can have a higher combined economic value than the few popular items that dominate the news or sales. According to Anderson:

“The theory of the Long Tail can be boiled down to this: Our culture and economy are increasingly shifting away from a focus on a relatively small number of hits (mainstream products and markets) at the head of the demand curve, and moving toward a huge number of niches in the tail. In an era without the constraints of physical shelf space and other bottlenecks of distribution, narrowly targeted goods and services can be as economically attractive as mainstream fare” (Anderson, 2006, p. 52).

Anderson uses many examples from the world of entertainment, most notably the music industry, to show how many factors, especially the Internet, have contributed to the creation of long tails in most every industry. For Anderson, it's all about accessibility and recognition that choices are often unlimited.

Anderson argues that the “tail” of the curve on the far right side, in which one can find most everything and contains the niche products, is far longer than we realize, is within reach, and that when all those niches (or non-hits) are added up, they make up a market that rivals the hits (Anderson, 2006, p. 23).

How is the long tail relevant to Extreme FRD and our need to connect with donors? Putting economics and shelf space aside, the relationship is simple. At the “head” of our donor curve, we find our core supporters (our “hits”). Many of them are our large

donors, but most are the board members, leadership, etc. But way out in the “tail,” there are those who give to us at different levels whom we don’t know but who have great potential. In our world, a donor’s position on the long tail (and the corresponding height on the y-axis) is not based on a gift level but on the strength of his/her connection to the federation.

The long tail provides DOs with great opportunities for connecting with donors with whom there is not much contact. Whether a community is large or small, there is a strong likelihood that there are donors to whom we have not reached out in a proper way. While larger communities have more options in this regard, smaller communities can still adhere to the principles of Extreme FRD by strengthening relationships with as many donors as possible, especially those in the “tail.”

One opportunity in the long tail that should be explored by professionals from any size community is the group of donors who are “covered” under gifts, most often being the adult children of major donors. This group could be referred to as “Generation C” or the “Covered Generation.” They are part of strong, generous families, whose patriarchs and matriarchs are often the pillars of the community and serve as past leadership. But the adult children have fallen through the cracks and are almost a lost generation with regard to their giving identity. We tend to focus so much on the actual gift and the key contact person that we lose sight of the fact that there are others who are technically part of this gift, the next generation, who are intelligent, have interests, are gainfully employed, are successful with their own resources, and are potential candidates for greater involvement, not to mention personal giving.

We also need a greater emphasis on these adult children, covered or not, because one day, many of them will be the decision-makers for the family gift, or in some cases, will inherit significant dollars. If we do not reach out to them now, we risk losing them. For years, they have been out there in the “tail” while we have spent time engaging with their parents who are known to us and reside in the “head.” We need new strategies, from individual outreach efforts to multigenerational family meetings to welcome them, pay more attention to them, and bring them into our family. We need to be their friends.

Concept # 3 - Strengthen the “Development Officer-Lay Partner-Donor” Triangle by Putting the Development Officer at the Center of the Storm

The result of focusing on enhancing relationships, coupled with expanding the role of the federation professional, creates a dynamic that is defined by improved collaboration and communication among staff, stronger connections with donors, and a strategic partnership with lay leadership. This integrated model serves as the foundation of the relationships in Extreme FRD, and the “triangle” that exists because of these relationships allows a more focused approach to engaging with donors in the “long tail.”

Putting the DO at the center of the storm is a different approach to the traditional model of FRD. Usually, when we think of the center, we think of a donor-centered approach, whereby the donor is at the center of the giving universe, and as professionals, we do our best to match up the donor’s interests with appropriate giving opportunities. In Extreme FRD, the donor remains at the center, but in addition, there is another center (call it a second hub) in which the DO can be found as well. While one focus remains on the donor and his/her interests, the other focus is the work of the DO in managing the involvement of the donor with colleagues and lay partners. Why is this so important? Because too many donors are shifting over to the “tail” and falling through the cracks, and DOs need to reconnect with them.

The Development Officer

What is a development officer in the Extreme FRD model? Simply put, the DO is the professional on the front lines responsible for:

- Working with colleagues and lay partners in overseeing the cultivation, solicitation, and stewardship of donors and potential donors.
- Strategizing on the ways to engage donors and keep them engaged.
- Serving as an “account manager” or “go-to person” for donors for anything related to their giving or involvement.

In the Extreme FRD environment, some DOs are able to do these tasks full-time, for it is their main job function. But for many professionals, whether they work in a traditional development department or not, DO work is only a part of their responsibili-

ties, and the challenge is for them to find the time for it and have a constant awareness of the potential for FRD opportunities, especially when they least expect it. The goal is to make their DO roles seamless with their other responsibilities.

The problem, of course, is that given the length of the long tail, especially in larger communities, there are simply not enough DOs to adequately serve the donors who deserve our attention. While we are blessed with the ability to work side by side with lay partners, many of them have day jobs and are limited in the amount of time they can give. And while Extreme FRD is all about getting everyone in the game by asking all federation professionals to play some kind of role in resource development, we are in desperate need of more DOs who can devote a high percentage of their time to one-on-one donor engagement. The answer may simply be looking toward federation leadership to decide that a greater investment is needed in the area of financial resource development by hiring more DOs, training them, and setting them loose to connect with donors.

Regardless of the number of full-time DOs, the fact remains that not all our DOs have the same expertise. As a result, DOs need to be ready to partner with each other. While all DOs should have the ability to have a conversation about the annual campaign, the basics of a donor-advised fund, or a current federation initiative, the DO should be ready and willing to partner with a colleague if more technical expertise is required, whether that be a more complex giving vehicle or perhaps a community relations issue that needs the participation of a JCRC professional. The goal is integration, so that there are no walls between staff and colleagues who see each other as being on the same team.

The Lay Partners

Relationship building is not limited to our work with donors. We wouldn't be where we are today without the efforts and involvement of our lay partners, the DO's best friends. We can't forget who we are: a lay-driven organization, where ideas, policies, and action go through our lay leadership in a full partnership. Ours is a unique institution when it comes to building relationships with donors. While we sometimes think of ourselves as ones who embrace and emulate aspects of the university model of fundraising, there are differences, not the least of which is that most uni-

versities would do anything to have the kind of annual donors we have. But in addition, we have something that the universities do not have: a deep, talented pool of volunteers who participate in full partnership with staff in our efforts. Just like donors, we can't take them for granted, and we need to remember to engage with them, challenge them without overwhelming them, and remind them of the important role they play in the community.

One important group of lay partners for Extreme FRD is what is commonly referred to as the "next generation." They have business savvy, understand the model of having "account managers," and while at times, they are a bit impatient with the federation process, many of them think in the Extreme FRD mindset of partnering effectively with DOs, as it mirrors their approach to business. To be successful in convincing them to want to partner with us, we need both a different way of talking with them and models to make their involvement more attractive. Unlike previous generations, the federation is just one of the many choices for them. In order to compete for their resources, time, and peer contacts, we need to meet them halfway, recognize that they have many interests, and encourage their participation at all levels and organizations, confident that with proper education, their federation involvement will increase as well. We should not be threatened by their many interests but see them as opportunities for new entry points. It's a bit of a risk (think extreme), but the rewards are pretty compelling.

The work of the DOs would be enhanced if one of their top priorities would be to facilitate the meeting of a donor with a lay partner. True, many DOs have developed wonderful relationships with donors over the years and have raised significant dollars because of these relationships. And in many cases, the professional fundraiser is the right person to solicit a gift and is taking on this role more and more, particularly at higher giving levels and for purposes of stewardship. Yet while we talk about our development team as a sales force for the organization, we stand the best chance for success if we find the right match between a donor and lay partner, or at the very least, involve the lay partner in the conversation, particularly if an "ask" is involved or we are looking for a "warm" introduction to a potential donor.

Further Keys to Success: the Executive, Technology, and a Plan to Get It All Done

Three remaining areas further strengthen the DO's ability to succeed: the role of the chief executive, the role of technology, and a sound operational plan that promotes the role of the DO in the organization.

The executive has the important responsibility of articulating and reinforcing the vision of an integrated resource development approach. The executive needs to be a ringleader, bring enthusiasm, and set an example. He or she needs to do a high number of solicitations and set the bar high by soliciting for anything and everything. Finally, the executive needs to elevate the status of the DO and partner with him/her as a colleague for successful outcomes, which brings legitimacy to the overall process. Any opportunity that can take place in which a DO collaborates with the executive is a huge step for the organization. The DO gains great exposure, the executive's involvement raises the stakes, and the goals of Extreme FRD are further realized.

Aside from people, technology—specifically a donor management system—is a big part of the story and is crucial in supporting the work of the DO. There are many different types of systems, but the key is how we use it, for if successful, it provides one-stop shopping for everything a DO needs to know about donors. Especially important is that it serve as a clearinghouse for all contacts and write-ups of face-to-face meetings. Extreme FRD puts a premium on these contacts and reports because a professional or lay leader should not meet with a donor without knowing the past history of contacts. It is important for both institutional history and for the meeting preparation process. If someone is meeting with a donor, he/she should be on top of what has taken place in the past.

Of course, it is problematic if the information is not there. While most systems are set up to capture the information, it doesn't get in by itself. DOs should be on top of entering their contacts and trip reports so that they don't fall over themselves, especially in an integrated environment where many things could be happening with a donor at the same time. Utilizing technology mirrors the goal for staff to share information and opportunities. Trip reports should conclude with "next steps," in which the DO writ-

ing the report assigns various follow-ups to staff in relevant departments, all resulting from the conversation with the donor about his or her interests. It could be anywhere from an issue related to community relations to the donor's desire to serve on a committee. The point is that we are here to serve the donor, and if we do so in an integrated way, whereby information gets circulated and appropriate follow-ups take place promptly, correctly, and to the donor's satisfaction, then we are doing our job and the donor will likely trust us even more and want to remain engaged with us. Our systems provide the vehicles for keeping us on top of things and direct the DO to manage this process. The systems also provide an important tool for monitoring and evaluating the work of the DO so that reports are readily available to see what has been done.

Despite all the above, DOs won't succeed without the federation instituting a clear operational plan. Management needs to guide DOs, direct them to think beyond traditional areas of responsibility, help them find lay partners, and establish true goals and expectations for their work with donors. Here's a five-step plan to help DOs succeed:

- Create an environment and atmosphere that supports, encourages and motivates DOs to partner with willing lay people in identifying donors and spending time out of the office, meeting and engaging with them. The long tail tells us that there are enough donors and opportunities to go around. After creating and fostering relationships with donors, younger DOs should stay with and nurture the donor instead of giving up the "rights" to the donor to the next professional up the food chain.
- Train DOs on how to engage with donors for purposes of cultivation, solicitation and stewardship. Help them to understand what "moves" are appropriate for their assigned donors, and have them identify these moves for their donors, both short-term and long-term.
- Schedule regular meetings for all DOs in order to provide a forum for discussion, donor review, updates on federation initiatives, and training. Examples of training include basic solicitation training, "working a room and moves management," as well as educating them on which current issues the community is facing.

- Establish clear objectives for DOs that can be measured and to which they should be held accountable, including frequency of visits, logging contacts, identification of new donors with whom to meet, and general collaboration with other professionals. In addition, attempt to determine at the outset what rough percentage of time the professional should be spending on DO activities, based on his/her overall job responsibilities.
- And finally, Extreme FRD needs extreme supervision, so that DOs are not operating in a vacuum. As part of their regular supervision, DOs need to go over their assigned donors, monitor progress, and work together to plan strategy.

The DO can be successful and serve the donor with proper training, good partners, and a solid infrastructure, but nothing makes a difference as much as a good product. The annual campaign, as a community-building tool, is a great first option.

Concept # 4 - Utilize the Annual Campaign Experience as a Community-Building Tool and as the First Step in Creating Effective Centers for Jewish Philanthropy

When all is said and done, the job of the DO is to provide a satisfying experience for the donor so that the interests of both the donor and the community are served. As mentioned earlier, there are various tools to engage with donors. With the donor-centered approach that Extreme FRD supports, the choices are unlimited for allowing the donor to do good things with his or her dollars. But while it is tempting to focus the conversation toward projects and donor-directed areas, it is important to resist this direction if the annual campaign gift is not also part of the discussion. Why? Because without the annual gift, there is no context for what the community is about in the first place. Just because donors have a variety of interests doesn't mean the annual campaign should be a small part of the FRD picture. It is too crucial to what we do, for it sets the tone and defines what collective action is all about. While one could debate if the federation is a fundraising organization or a community-building organization, the reality is both, because the annual campaign, the hallmark of the federation's activities, is the best community-building tool we have.

The annual campaign needs to be first on the federation's

resource development agenda. Its primacy drives our efforts and it should always be on the table as part of the “ask.” An unrestricted gift to the annual campaign sets up future conversations. Most importantly, the annual campaign builds community. That is what we are all about. If we don’t talk up the annual campaign, we lose the connection that brings us together. With greater emphasis of late on specialized fundraising efforts, we have neglected the original association donors had with us. While this approach has yielded some impressive results, it is less successful if supplemental giving does not begin with recognition of our “flagship fund” (the annual campaign).

Centers for Jewish philanthropy are important, but they are only successful if the conversations include discussion of the annual campaign. True, the role of the annual campaign is to sustain the community, whereas the large supplemental gifts provide the transformational change needed to take our communities to the next level. But to get these donors in the door and to have these conversations with them in the first place, we need a vehicle to reach them. The annual campaign provides this, and once they recognize the value of the annual gift and trust the federation as an institution, they will want to stay for more and see what they can accomplish with us through other means.

We do, however, need to be ready and nimble when an opportunity presents itself for the big ask that is beyond the annual campaign. The current Israel Emergency Campaign (IEC) is a good example. At the end of the summer of 2006, federations received gifts from major donors for IEC that were several multiples of their annual gifts. And while over the years, many of these annual gifts did not take such dramatic jumps, we have seen that these donors will continue in the years ahead with a strong, if not increased annual gift because of the primacy of the annual campaign. IEC was not the end of the story as far as their giving, but rather, just continued the story. We have the luxury of an annual vehicle that keeps the community going, while also having the ability to ask for and receive the big second gift, whether to transform the community or help during a time of crisis. And we can do this only if we have strong relationships with donors.

Annual Campaign Events as Community Building Opportunities

What happens when the concept of Extreme FRD is combined with one of the more traditional ways of raising money, that being campaign events? The result can be a positive experience for everyone. Events have, and continue to be, the bread and butter for many federations as one of the more efficient and effective ways of raising money. For many federations, events are ingrained in the culture, and many donors identify with their federation at the event to which they feel an affinity.

Of late, events have become more multidimensional as a platform for not only the annual campaign and our message, but for community building and providing exposure to what else the federation is doing. As Dr. Steven B. Nasatir, President of the Jewish United Fund/Jewish Federation of Metropolitan Chicago, said in remarks to his fellow large city executives in 2006:

“Extreme FRD is also about integrating community relations and advocacy for Israel, plus planning and allocations in a way that promotes community goals while reinforcing the primacy of federation and branding of the institution in connection with the high visible programs that donors expect us to be leading” (Nasatir, February 28, 2006).

Nothing like events helps get a message out.

Consider an event that was held in Chicago in June 2006. It was a Trades, Industries, and Professions dinner for lawyers, financial services, government agencies, and high-tech divisions. Held downtown at the Auditorium Theatre, 2,800 people attended to hear Colin Powell speak. As participants entered the theatre, logos of the presenting corporate sponsors were up on the big screen, as well as images of the federation’s activities. Before the event, there was a reception on stage for 500 business and professional leaders and sponsors. So what did the attendees experience? A multidimensional organization with community sponsorship, and an audience comprising industry leaders, professionals, and community members, all there for one cause, and driven by the same ideals of wanting to be part of an organization that makes a difference in the world. On that particular night, it was the federation that was making the difference and attendees learned how it is a player in so many areas. The event was not just

about the annual campaign, but also about the institution and what its role is in the community. Talk about branding!

A successful event like that would have been enough, but when the DO is involved, it makes it even more so. By personally engaging with donors before, during, and after an event, and by sharing with donors the vast scope of the federation, the DO plays an important role. The draw of the speaker helps, but the DO makes the experience for the donor more than just another event. The Extreme FRD model ends up balancing our traditional business model of doing things (such as events) with a more personal approach. The result is the federation now has a face (well, many faces), and as one up-and-coming lay leader likes to put it, you give “through” the federation, not “to” the federation. While this is not a new phrase in our culture, it is, for him and he says it in part, because he has gotten to know us, trust us, and understand what we do.

Concept # 5—Positioning of the Federation, Campaign and our Agencies as Vehicles of Trust and Integrity

The idea of trust is the final component of Extreme FRD and in many ways, one of the most important. While most of Extreme FRD is about communication among staff, new roles, and risk-taking, the issue of trust dictates whether our efforts will be successful or not. If donors don’t trust us, we lose all credibility. Donors look for integrity, transparency, and legitimacy when deciding whether or not to support a cause. If DOs and lay partners can show to donors and potential donors that the federation is an institution that is worthy of their dollars due to high standards and accountability, a huge hurdle is overcome, and the conversation can move on to the needs of the community.

Within hours after the attacks of September 11th, millions and millions of dollars began flowing to the American Red Cross for victims of the terrorist attacks. Yet it later came to light that some of that money was used not for victims but other Red Cross needs, including local needs of the various chapters. (Attkisson, CBS Evening News, July 30, 2002). The Red Cross also had troubles following Hurricane Katrina. Donors notice problems, especially if they happen with a local institution. Because of these experiences, it is crucial that federations are clear with donors as

to how their money is spent. Whether through annual reports or special mailings, one of the best ways to build up trust in fund-raising organizations is good reporting.

Trust is also an issue in terms of how DOs and lay partners speak with donors about the federation. Donors want to know that their federation is legitimate, has a strong history, has financial strength, provides a big bang for their buck, has solid professional management, and offers a diversified approach to maximizing effectiveness. Trust leads to confidence and attachment, which in turn opens the door for further conversations and involvement. We can never be too extreme in our concerns about building up trust.

How Do We Evaluate Extreme FRD and What Should Our Expectations Be?

Where should Extreme FRD take us? With the ultimate goals of providing for the recipients of our federated system and strengthening our community, the bar is set high for achievement. Can we measure success? On some levels, yes, such as are we getting out and meeting with donors, raising more dollars, etc. On other levels, it is not as easy, as many of our efforts will require a long-term perspective to see if increased cultivation of donors made a difference. But perhaps a few areas can be evaluated in each of our federations:

- Do we seem to have better relationships with more donors?
- Is our staff more cohesive and integrated? Have we aligned our goals for the same purpose of engaging with donors?
- Are we evaluating our DOs not just on how many gifts they are closing and how many times they are out meeting with donors but also on the kind of new relationships they are creating and if they are setting up their colleagues in other departments for further opportunities in this integrated model?
- Have we visited the “long tail” to find more opportunities?
- Is there a sense of trust in the federation among our constituents?

Being extreme and community building go hand in hand. We have no choice. We have to explore life along the edges to allow for greater rewards. Extreme FRD is about pushing limits, trying new

ideas, and recognizing that integration among departments and staff for the purpose of raising dollars is not only doable, but also critical. The irony is that the more we think of being extreme, the more we realize that it is what we should be doing in the first place.

No, we don't have to grow our hair long and jump off a mountain strapped to a wooden board. But we should take that leap and try some extreme measures with our FRD so that we change our approach and culture, with the hope that one day, we won't have to think twice about it.

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Exercising Leadership for Systemic Change

Berinthia R. LeVine

Abstract

This paper details and advocates for seven strategies that federations must embrace to be successful. Exercising adaptive leadership skills, federations must:

- View and brand themselves as part of one national system with one name.
- View and promote themselves as centers for Jewish philanthropy.
- Recognize that donor demographics demand a new approach to fund development and invest accordingly.
- Invest in their infrastructure, finding resources and employing creative techniques to attract, train, and retain talented individuals.
- Find more seats at the table for talented lay leaders from all segments of our community, creating avenues of involvement that meet the stakeholder where they want to be met.
- Invest in technology to enable stakeholders to see, feel, and touch that which they cannot physically connect.
- Invest in sophisticated market and donor research that will inform their planning, marketing, and strategic community outreach.

There are many definitions of leadership, and much has been written on the topic. A recent Google search on “articles about leadership” pulled 55 million hits, and on the word “leadership” pulled 179 million hits. Search Amazon.com for books on leadership, and you can browse over 203,000 titles. Every author defines what it means to be an exceptional leader and/or gives tips on how to effectively lead organizations. For some, being an effective leader comes naturally. For others, exercising leadership is a significant challenge. I believe that leadership is the ability to inspire, empower, transform, direct, marshal resources, create ownership, and take responsibility for the successful strategic direction and outcomes of an organization. Effective leaders are catalysts with creative, synergistic energy that translates into

vision creation and implementation for an organization.

The federation system has been blessed with many talented individuals who have exercised leadership across a whole host of issues. However, as talented and effective as they are and have been, we still find ourselves struggling for market share. In fact, we are struggling with the very same issues that we were struggling with 15 or more years ago: plateau-ing annual campaigns with declining purchasing power, decreasing donor base, intensified and expanded competition from other non-profits, often expressed as mega gifts in the general community, increasing endowment assets, much in donor advised funds, huge transfer of wealth occurring now, a next generation that views federations with skepticism, rapidly increasing numbers of Jewish elderly, precarious government funding, lack of sophisticated research and strategic policy planning, diminishing Jewish affiliation and connectedness to each other and to Israel, our ever-expanding agendas, and a struggling national system. Sound familiar?

Couple these with more recent trends of rising anti-Semitism, increased security and safety concerns, rapidly changing demographics, and the tendency of people to “bowl alone,” and one has to ask, “How?” How is it that, with all of the brainpower available, not to mention resources, we have not yet made *significant* progress in addressing these concerns? Are the challenges insurmountable? Are we so caught up in tradition, in preserving our past, that we cannot envision the future and what it will take to ensure a thriving Jewish community? Do we lack the vision, the strength, the leadership, to do what we need to do to successfully tackle these and other myriad challenges every organization faces every day to ensure success? If it takes us another 15 or more years, it just will not matter by then.

Various solutions have been proffered for many of these challenges. UJC’s recent Financial Resource Development (FRD) study (2003) has spawned a whole host of pilot efforts around collaborative fundraising, emerging communities, and the next generation, all designed to improve our bottom line. We have embarked upon leadership training courses at the highest levels of our system and are rethinking our marketing efforts. And UJC’s board has begun discussing what it means to be a continental system. Let’s hope this is not too little, too late. What we need is a par-

adigm shift, a new way of looking at how we manage our system. We cannot run our businesses as usual. We cannot rest on our distinguished history. According to Jim Collins:

“No matter what you have achieved, you will always be good relative to what you can become. Greatness is an inherently dynamic process, not an end point. The moment you think of yourself as great, you slide toward mediocrity”(Collins, 2005, p. 9).

Mediocrity is something that does not fit into our vision of thriving Jewishly. In order for it to remain outside our vocabulary, we must ask ourselves some tough questions and answer them honestly. We must recognize that the challenges we face are adaptive in nature. They have complex solutions that will require all stakeholders to think and act differently, often letting go of deeply held values. In order for us to create solutions for adaptive challenges, we must view the system from 30,000 feet, not ten. We must conduct an honest assessment of the circumstances, noting the behaviors that get in the way of our making change. Do we avoid tough issues in favor of taking the less stressful path? Do we understand which deeply held beliefs are being challenged when we attempt to make change? Do we try to move too quickly? Too slowly? Do we listen to those whose opinions differ from our own, asking questions and learning from them? Do we forget that we have talented lay leaders and professionals who are excellent communicators, problem solvers, and implementers? Do we attempt to do it all ourselves? For the right reasons? For the wrong reasons?

This paper will detail and advocate for seven strategies that federations must embrace in order to enable us to effectively address the identified challenges. It is important to emphasize that there is no “quick fix”: Snap your fingers and it’s done. Implementing all or any of these ideas will require us to exercise adaptive leadership skills. This by definition will require us to emerge from our comfort zone so that we can effect significant change. And making change is not comfortable. Groups and individuals will experience losses. To be successful, this type of change is not simply imposed from above—the factors involved are too complex, too emotionally charged. Successful change will come about when the leadership engages those most affected by the change to create solutions. Federation leaders, with professionals in the fore-

front, must summon all their reserve to lead, not dictate, the change process. We must keep at the task. We must make the time. We must not be diverted from this important and urgent work.

The following recommendations will require taking a new approach to our work. Some of the ideas will challenge our core beliefs about what has made our system strong and what has sustained it all these years. None of the ideas are radical, but they will require our taking a fresh look at how we do business in the federation world.

In order to effectively address the challenges we face now and to position ourselves to face the challenges of the future, we must:

1. *Invest in infrastructure, finding resources and employing creative techniques to attract, train, and retain talented individuals*

We cannot run effective organizations without qualified, well-trained staff. We aspire to be a world-class organization, one that is attractive in the marketplace, one that is viewed as a great place to work, not only because of a motivating mission but because of a progressive work environment. We pride ourselves on the low cost of doing business. But without investment in our infrastructure, we will not succeed. Letts, Ryan, and Grossman (1999, p. 32) outline various approaches to capacity-building, "In the non-profit world, programs and organizational capacity are almost seen as competitors in a zero-sum struggle for limited resources." We cannot be part of a zero-sum game.

We need a more diverse workplace. We need more men to enter the field. We need more women in leadership roles as the heads of major federations. We need a diversity of generations in professional leadership positions. We need to provide better management training for our mid- and senior-level managers. We need to create incentives for staff such as Birthright-type trips to inspire commitment, help reconnect with the vision, and improve retention. We need to train our professional leaders to identify and hire talent and to challenge the talented. We need to abandon an appointed and anointed system for leadership positions, in favor of a merit-based system. We should begin grooming potential staff members by having high school and college students participate in internship programs; create mid-career job-changer incentives and training programs; encourage additional programs such as the Mandel Executive Development Program in each of our commu-

nities; identify and work with lay leaders who understand this priority, share our passion, and are willing to financially support our efforts.

Our organizations are complex and need professional leaders with sophisticated management training. We must create more strategic partnerships with institutions of higher learning to identify and train interested individuals; create mandatory training sessions for our managers on how to supervise, mentor, and coach; create mentoring programs; create flexible work environments and special programs directed particularly toward part-timers; and provide creative incentives outside of increased salary to make our workplaces more attractive (e.g., on-site day care, Judaic learning). Send our staff to Israel frequently. Create a koach (or other suitable name) program that sends staff on specially designed staff missions upon their three-year, six-year, ten-year, etc., anniversaries.

2. *View and promote ourselves as centers for jewish philanthropy as places that provide operating and other funds for local, national, and international partner agencies, help Jewish philanthropists accomplish their philanthropic dreams, and convene creative thinkers to identify solutions to current and future issues.*

Much has been written of late about what many call the outmoded concept of federations as the central address for the Jewish community. Gary Tobin (2006) recently suggested that we should consider ourselves more like Grand Central Station. Regardless of the terminology or whether we view ourselves as the central address, the most successful federations today and in the future will capitalize on the concept of a center for Jewish philanthropy, a one-stop-shopping place for those who wish to make a significant difference in the world. Centers for Jewish philanthropy have appeared all over the system. Each has its own concept of what it means and how it functions. To be successful, however, these centers of philanthropy must view what federations do as philanthropy in its broadest sense. We are not just fundraising for a cause. We are building community, one person at a time. And building community is more than the annual campaign.

Centers for Jewish philanthropy need to provide a place that will support donors who seek to see, feel, and touch, who want to

engage in philanthropy that maximizes their impact and leverages their funding. This is not a repackaging of our annual campaign, nor is it solely a center for funds and foundations. It is a place that will convene donors and funders. It is a place that will house a fluid product warehouse of funding opportunities. It is a place that will convene creative thinkers around big ideas. It is a place that will not only manage and invest donor advised funds, supporting foundations, and private foundations wisely, but will also help individual donors and funders explore funding options based on their individual interests and desires. It is a place that will emphasize the importance of unrestricted dollars to the community and its agencies while fostering collaborative fundraising at its best. It is a place that will provide consulting services to donors and institutions alike from a specialized team of professionals. It is a place that will provide customized service, based on the concept of markets of one. It is a place that will emphasize organizational and philanthropic effectiveness. It is a place where Jewish philanthropists can fulfill the teaching *Kol Yisrael arevim zeh ba-zeh*, that each Jew is responsible one for the other, even while focusing on their own interests. It is a place where we can impart our historic mission and vision of making the world a better place through *tzedakah, chesed, and tikkun olam*.

Changing our focus in such a way is risky for some, particularly those who view the annual campaign as “the way” instead of “a way” to build community and provide resources. This is also unfamiliar territory for many and will require professional and lay leaders to learn new skills and assume new responsibilities. But, if executed appropriately, this strategy will position our system as *the* place to be to engage in effective, meaningful philanthropy.

3. *Take a more holistic approach to philanthropy, with the annual campaign as one of many potential untapped entry points to the system, and invest accordingly, recognizing that donor demographics demand a new approach to fund development.*

Our new collaborative model is a step in this direction. The challenge will be to ensure that it is not more of the “same old” with a new name. Annual campaigns form the backbone of any development program, whether for UJC, universities, hospitals, or other non-profit entities. One cannot operate an organ-

ization, let alone a community, without a solid base of unrestricted operating dollars. But UJC's annual campaign has become transaction-based. It is not transformational for the donor in any way. That is not to say that the funds raised do not make transformational change in the community. It is to say that, for the donor, there is no transformation. And today's donors want to see, feel, and touch their philanthropy. Note the rise of giving circles, private foundations, women's foundations, and donor advised funds. Donors are looking for so much more than a once-a-year call. Federations have not been able to change the vast majority of donors' perceptions that they only hear from us once a year and that is to ask for a gift. This is a contributing factor to declining numbers of donors. We need to change our model.

Taking a holistic approach to philanthropy is not a new concept. It has just taken the system too long to adopt new ways of working with our donors. It is possible to grow the annual campaign and meet a donor's interests simultaneously. It requires us to view our interactions with our donors through a new lens, the lens of the long-term relationship. Fundraising is all about relationships. Our work is all about relationships. We work to develop a relationship with a donor so that we can get to know the donor's interests and the donor can get to know ours. The ideal outcome creates synergistic energy. We know that many of our current donors have excess capacity, above and beyond what they give to the annual campaign. By supporting a donor's interests and working closely with that donor over the longterm, we increase the likelihood that the donor's trust of us as an institution increases. This expanded confidence in us as philanthropic agent is likely to be expressed through increased support of the annual campaign and through support of other high-priority projects. Building long-term relationships and providing opportunities outside of the annual campaign is not a zero-sum game.

It will necessitate segmenting our databases and creating targeted individual and group strategies in ways we have not done before. The biggest change, however, will be in the creation of the development team. Given the number of our current major donors and the need to identify and cultivate future major donors, it will be imperative for us to empower and train each of our staff

members to be part of the development team. Each staff member becomes a relationship builder/development officer/liaison working with and responsible for the cultivation and engagement of a set group of donor prospects, perhaps as many as 150. Lay leaders will need to enlarge their repertoire, serving as relationship builders and advocates, not solely as solicitors.

Taking this approach will require the creation of a product warehouse that includes capital, programmatic, and endowment opportunities in the Jewish and general communities, for federation partner agencies, synagogues, and other institutions. It will require taking a new look at our prospects and taking into account changing donor demographics. As the current future inheritors of the largest transfer of wealth in our history, women must play an increasing leadership role in our communities. So must the next generation. We must be prepared to utilize a variety of strategies. Marketing is key to the success of this activity. As our reputation for follow-through and innovation becomes known, others will want to take advantage of our expertise, not just in annual fund-raising but in creating resources for significant needs both within and outside of the Jewish community.

4. Find more seats at the table for talented lay leaders from all segments of our community, creating avenues of involvement that meet the stakeholders where they want to be met.

Federations should be involved in developing engaged lay leaders who express their passion for improving our Jewish world through commitment of their time, talent, and tzedakah. We know through market research and our own experiences that meaningful involvement in the work of an organization leads to meaningful investment. The key concept is what constitutes “meaningful.” It is different things to different people. Research points out that each age cohort has different definitions of what constitutes meaningful. What works for one generation will not work for the next. Their experiences and the way they look at the world are different. We need to be mindful of this research and develop multiple approaches (Lancaster & Stillman, 2002).

Recent research through UJC’s FRD Study (2003) yielded the following quote from a major donor prospect:

“Federations think that building relationships is about going to meetings, and they think that if they get you to meetings, then you

are vested; there is virtually no cultivation and no team building. It is more important to us to have a relationship with the president (of a university or hospital)."

Is the work we do with our lay leaders, through their involvement with us, transformational or merely transactional? Do we engage our lay leaders in problem solving or rubber stamping? How can we create meaningful places at the table for major donors and talented community stakeholders? How do we manage expectations of younger leaders who are already engaged at a leadership level in other organizations, yet are called young leaders in our own communities?

We need to rethink how we engage people in our work, so that we build strong communities. Shortening terms of office on boards and committees is an insufficient solution. We need to look at the issues we face and identify teams of experts around the issues, to gain ownership, to take responsibility, to lead to future commitment. This will require significant staff involvement and again, a reframing of the role of the federation professional.

And it will require us to re-examine the lay-professional partnership. What is our role as a professional? What role does the lay leader play? Are professionals solely implementers of policies developed by lay leaders, or are we partners in an endeavor that is so critical to the future of the Jewish people that it requires the talent, knowledge, and resources of both lay and professional partners?

5. *Invest in Technology That Will a) Enable Stakeholders To See, Feel, and Touch That To Which They Cannot Physically Connect, and b) Mitigate Against Geographic Dispersion of Families and Seasonal Migration of Lay Leaders.*

We have not begun to invest the resources that are needed in the technology arena. For all the jokes about "CrackBerrys" and the like, the technology age is improving the way we work on all fronts. However, we are not investing enough fast and creatively enough. Technology can enable us to help donors see, feel, and touch our work while sitting in the comforts of their own home or at an event. Providing a live feed with interviews and tours is just a step away. We should put streaming video in our pockets so that when we meet with a donor, we can take them to Jerusalem, to St. Petersburg, or to Havana, to see our work and hear from the

people who are being affected by us today, this minute. Podcasting and vodcasting should be commonplace for us.

We should invest more in online conferencing and Web-casting, enabling traveling board and committee members to stay connected and facilitating meetings for supporting foundations whose family trustees live in different places. We should provide remote accessibility for our staff. We should amend our by-laws to enable us to conduct online voting and quorums. And what about the use of toll-free numbers and Internet phone services? We should create new online communities through blogs. We need to use the Internet as a two-way path for communication. The Internet must be one of our most indispensable tools if we are to succeed in the future. Our Web sites are being compared on a daily basis to the best of the best. They must be creative, exciting, and above all, interactive. Where is the action on our Web site? Our streaming video? Usability is of utmost importance. And it is not just about us and what we want to put in front of our users. It's about what our users want to learn and how quickly they can find it. Content management and usability go hand in hand. We need to help those new to our communities connect with us and with others with one click. Market research can help us define our priorities. Talented, savvy, knowledgeable lay leaders can provide their talent, their wisdom, their expertise and, if engaged and cultivated strategically, their financial support for this essential endeavor.

6. Invest in sophisticated market and donor research that will inform planning, marketing, and strategic community outreach.

We have the capability to understand our markets and customize our approach in ways never before possible. Research enables us to identify issues and trends so that we can make sound decisions on the wise use of our scarce resources. Whether conducted in-house, through partnerships with universities and other academic centers, or through market research firms, the information gathered is critical to how we address issues. Hiring outside professionals often avoids biasing our answers. Research helps us understand our market: their wants and needs. It helps us determine whether a new program is needed and if so, how it can best be structured. It helps us develop fundraising messages and materials. When we neglect this crucial component of our

planning, we run the risk of wasting community dollars.

7. *View and brand ourselves as part of one continental system with one name, e.g., United Jewish Communities—Cleveland, United Jewish Communities—Chicago, United Jewish Communities—Baltimore, United Jewish Communities—Des Moines, etc.*

What's in a name? Everything. Nike, Coca-Cola, Starbucks, JNF, AIPAC. Whether in Cleveland, Ohio; Fairbanks, Alaska; Vancouver, Canada; or Addis Ababa, Ethiopia; these names and acronyms have national and international brand recognition. A name, a brand, creates a corporate identity for an organization. A good brand helps build market share and increases revenue. It helps create community in a world where community is constantly being redefined. This is vital in our geographically mobile, Internet-savvy world. But branding is so much more than a name.

A brand symbolizes the values, the mission, and the vision of an organization. It creates associations and expectations. Brands and their accompanying logos, colors, and/or taglines are often the most protected assets of a corporation (e.g., the Nike swoosh). We all need to be United Jewish Communities and all that UJC represents. We need one name that we and our children and our children's children, no matter where they live, can be proud of, that unifies us and creates an emotional tie larger than all of us. By adopting one name, we present a united front. Whether my child is in Boston, L.A., Chicago, Miami, New York, or Cleveland, UJC is the name to look for when thinking about connecting with the Jewish community.

Changing one's name sounds risky. Many federations have had their current names for decades. Their name has community and perhaps even national and worldwide recognition. It is how their stakeholders form an identity to the community. There is the sense of pride that long-time donors and lay leaders have in the organization by virtue of its name. However, there is much research showing that the benefits for change often far outweigh the risks and the losses that some of our stakeholders may feel. Textbooks, Internet articles, magazine articles, and consultants all lay out the steps necessary to change a brand or corporate name. Rebranding is a common phenomenon. We can learn from others, even those within the system who changed their names when we adopted the name United Jewish Communities.

A universal name will help us think about our universal vision, providing impetus to put our parochial interests aside, to help us focus on the larger vision of what it means to be a thriving Jewish community with continued staying power. We must encourage flourishing Jewish life in all of our communities, no matter whether they are experiencing growth or decline. A continental system with a consistent name will support the greater good of our communities.

These seven strategies have one additional overriding theme: It's about Who. Who will sit in the seats and who will lead the change? Collins (2001; 2005) notes that we need the right people in the right seats. If we have the right people in the right seats, we will meet the challenges to our existence and thriving as an organization, as a movement, as a Jewish community. If we do not, we will fail.

With the right people in the right seats, we can accomplish great things together. We can ensure our vision through strategic interaction and partnerships. Our ability to meet the identified challenges and others to come rests with our ability to be adaptive leaders. Our success or failure rests with the ability of our leaders to meet the challenge, to think adaptively, to move forward bravely. Jim Collins' research (2001; 2005) uncovered a "five-level" hierarchy of leaders, with Level 5 being the most effective. What differentiates Level 5 leaders from the rest of the pack is their ability to make the work, the organization, the movement, and the mission the prime motivators in their decision-making and to sublimate their need/desire for personal ambition and growth to the good of the organization. Collins also states:

"The whole point of Level 5 [leadership] is to make sure the right decisions happen—no matter how difficult or painful—for the long-term greatness of the institution and the achievement of its mission..." (Collins, 2005, p. 11).

But it is not just making the right decisions. It is asking ourselves how we will exercise leadership for systemic change, how we will motivate and inspire, empower and create ownership, recognize challenges and listen to challengers, pace the work and sustain concentrated focus, observe objectively and intervene as appropriate. It is asking ourselves whether we are willing to do the work, to take the risk, to accept the losses in order to achieve long-

term greatness. It is asking ourselves, will we be Level Five leaders, or will we be dinosaurs? The choice is ours.

Kadima (onward).

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Instructor Disclosure of Mental Illness in the Social Work Classroom

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Keywords: *mental illness; disclosure; classroom; stigma*

Abstract

Instructor disclosure of mental illness in the social work classroom can benefit students, who will most likely be working with this population during their social work career. Through disclosure students engage with the mentally ill outside the institutions and agencies where students usually interact with them. This de-stigmatizes mental illness, adds diversity to programs, and provides role models for mentally ill students. Using sexual identity disclosure as a model and incorporating the author's emic position, this paper explores some of the pros, cons, and ethical issues related to mental illness disclosure and makes recommendations for maximizing its pedagogical value.

For three years, I was in what could possibly be clinically constructed as one long episode of manic depression with various degrees of severity. These years are bookmarked by two crises, but throughout those years, I struggled almost constantly with regulating my moods, with taking medication, and with achieving my new "identity" as someone who is mentally ill. This three-year period has recently ended, with an unprecedented "run" of stability.

My experience as a chronically and sometimes severely mentally ill academic and mental health professional has forced me to confront the question of personal disclosure in the classroom and in the treatment relationship. For this paper, I will focus primarily on the relationship between student and professor and explore current ideas regarding the "how," "when," and "ifs" of disclosure and the possible impacts on classroom learning and on the class/professor relationship.

It was a conversation with my boss that led me to call my health care provider about my mental health. My performance at work was sliding and both students and colleagues had begun to complain about my behavior, which included disorganization,

missing meetings, forgetting about exams and other assignments, and going off on tangents during lectures and not being able to find my way back. I had difficulty focusing, and I was talking all the time (and fast).

As a professor of social work, I knew there was something wrong, but I was in denial. I did not want to be mentally ill. Being hypomanic in this culture gets one lots of praise for productivity and creativity. I wrote articles on different topics and did the same with presentations. Instead of being the narrowly focused academic, I had ideas about everything, ideas that came hard and fast. I felt as though I was on a bicycle with the pedals going faster than my legs could go, as my body could never seem to catch up to my brain.

I was eventually diagnosed with bipolar disorder, type I, with mixed states and rapid cycling. I felt like a failure as a mother and as a person, especially when I was told that for the next few days after my diagnosis, I would be hospitalized unless I had someone to come stay with me or unless I had somewhere to go where someone could be responsible for taking care of my child's daily life. I was scared, ashamed, disappointed, confused, and lonely. Intellectually, I knew that this was not my fault, that I had nothing to be ashamed of, but intellectual and emotional knowledge can be two different things.

Despite struggling to avoid a medication regimen for about 18 months, the time eventually came when I had no choice but to take medications so I could function at work and at home. Again, my performance at work was sub-par, as was my ability to function at home. I did not want to miss a day at work because it gave me some sense of normalcy and stability. "Normal" was my experience of it, but for my students, my poor performance caused them to lodge several complaints to my superiors: I was disorganized, behind in grading, and going off on tangents during lectures.

I explained my shaking hands and wobbly gait (side effects of lithium and clonazepam) to my students by simply saying I was taking some medication. I wanted to say more, but did not know how. I was comfortable with my students knowing, but I was scared that I would be seen as more than the absent-minded professor I already had the reputation of being. I also did not know how it would play with my colleagues. So I stayed hidden. In the

closet. I felt like a fraud, especially when the topic of the mentally ill came up in class (which, of course, was very often). I would talk about "them/they" when really it was "me/us." And although I had read Kay Redfield Jamison's (1995) book on her own experiences with disclosure in academia, as a professor on the road to tenure, I struggled with the issue of how disclosure of my mental illness would affect my career, my professional reputation, and identity.

My colleagues and my peers did not know of my mental health advantage: mania. I would simply smile when asked how I did all that I did and parent a child alone. What was I to answer—that it's my mania? My office is located near many psychologists'. One day one of them commented that if he did not know better, he would think I was manic. I admitted that I was. That led to a good conversation and then to many more, where we explored current treatments and how I was doing. I was playing with my medications, as I knew that my love of the rush of energy and creativity that was mania had brought me to this point in my professional career. I had mixed feelings about giving up mania in order to give up depression. I was being the "classic" client with manic depression.

Accepting that I was mentally ill, despite all I felt about rejecting the social stigma of that reality, was not easy to do. Being "mentally ill" was not an identity I was willing to own. I had not accepted the consequences of being mentally ill, even though by this time I had accepted that I had manic depression. The latter sentence may seem oxymoronic, but I could deal in some abstract way with being "sick." That is, I understood intellectually that sometimes the body did not function as it should and things go awry. However, being mentally ill—with its possibilities for hospitalizations, periods of incompetence, and the requisite feelings of being out of control—was totally unacceptable to me. When one is on the high of hypomania, there seems to be no need for medication. In fact, the creative bursts were what I had used to build my career. It was hypomania (and at times full-blown mania) that allowed me to complete all coursework for my PhD and MPH in two years, while getting an exemption so I could work 30 hours a week. I also knew the hell that chronic depression could be.

Being a mental health professional who knew the conse-

quences of what I was doing, who understood that I was being a classic patient with manic depression by being noncompliant with my medication regime, and who understood what that meant for my short- and long-term recovery was not enough to make me take my medications regularly for more than two or three weeks at a time. And it was that way for almost two years. On more than one occasion, the possibility of hospitalization would come up in my therapy session but I would not, and could not, accept being in a hospital as a possibility. I thought of the times I had to get a client hospitalized, and I did not see myself being like "them." I was still on the "us" side of the treatment fence, no matter how ill I got.

Eventually, I was admitted to a mental health treatment facility. Prior to voluntarily entering the facility (with an involuntary commitment hanging over my head), my teaching had deteriorated and I was barely functional. On occasion, I would excuse myself from class to cry in the bathroom, and then return to class to continue teaching. I was teaching macro practice and research methods. In the former, students were working with a community organization to do a "live" community development project and in the latter, they were working on their research proposals. As a small program, finding someone to step in was challenging, and so classes were canceled. Lucky for me, it was a short week due to a holiday, so only one session of each class was missed. But both classes were senior classes, which caused anxiety among the students, especially because they knew I was ill, but were not sure if it was my manic depression that made me absent from class. They were worried about me and about their own learning as they prepared for life after college, which for many included completing college applications that would pay much attention to their fall quarter grades.

I had told my class that I had manic depression. It was a simple statement that began with: "As someone with manic depression...." That was all there was to it. But saying those few words was like dropping a pebble into a lake, and I know now, after much thought and research, that I should have allowed for more processing by the students. Given that they knew me well (it is a small school with a cohort of students who take classes together and several classes from several professors) and they had nowhere

to go with their questions, some concern on their behalf would be expected.

During my hospitalization, I asked a lot of questions of my doctors, and because I was a mental health professional, they engaged me in long discussions about many clinical issues and controversies related to manic depression. One of the issues we discussed was medication compliance, which is one that frustrates many clinicians working with the mentally ill, especially those with manic depression. I began to understand that it was about distancing oneself from the identity of being mentally ill. One of my doctors urged me to consider writing academic papers about some of these issues, to use my insider position to illustrate my arguments. It was a challenge that he thought would make me an expert on my own illness, and that there was academic value to the subjective experience of a mental health professional, especially with regard to issues of professional distance, personal disclosure, and stigma. That was the birth of this paper and a chapter in an upcoming book that will be entirely about mental health professionals' experiences with mental illness—their own and their families'.

The shame I had already felt was intensified by my hospitalization. Fortunately, I had been able to avoid spending any time in hospitals, except for a half-day when I delivered my daughter. It was also difficult to be on the other side of the treatment fence after spending years working in mental health treatment facilities for adolescents. In addition, I had been forewarned that nursing students from my university did their psychiatric rotations at the facility where I was hospitalized and I had been asked if I preferred to go elsewhere. I did not.

Politicization and Disclosure

The preamble to the Social Work Code of Ethics states that “The primary mission of the social work profession is to enhance human well being... with particular attention to the needs and empowerment of people who are vulnerable, oppressed and living in poverty” (NASW, 2006). The mentally ill would qualify as the oppressed, and as social workers, we cannot support their oppression by helping to perpetuate stigma by supporting the secrecy and hiding that many mentally ill social work professionals seem to practice. The Code goes on to say that “Fundamental to social

work is attention to the environmental forces that create, contribute to, and address problems in living.” An academic culture that keeps the closet doors closed on the mentally ill within their midst is not living up to the ethical code that undergirds professional practice. The core values of integrity, dignity, and the worth of the person is missing when colleagues feel they must keep a secret that is often not very easy to keep, depending on the mental illness and the frequency and severity of episodes or condition.

The Code of Ethics also states that social workers have a responsibility to consult with colleagues in distress and help them to find appropriate resources, especially if it compromises competent practice. But in a culture—professional, academic, and public—many social workers are reluctant to take the initiative to disclose their own problems, because they fear the consequences to their careers and to the way they will be perceived by some of their own peers. Lastly, social workers have a responsibility to act to prevent and eliminate discrimination in the employing organization’s work assignments and in its employment policies and practices.

However, the Code of Ethics also states that should social workers become impaired through psychosocial distress, they should not allow this to interfere with their professional practice. They should “take remedial action by seeking professional help, making adjustments in workload, terminating practice, or taking any other steps necessary to protect clients and others.” It would be hard to argue that this is not in the best interest of both client and professional. Yet, the stigma of being mentally ill may support professional decision-making that runs counter to this aspect of the ethical code. Being impaired psychologically or emotionally is a major loss, and sometimes work is all that keeps someone going when their world is slowly falling apart. Unless the work environment is open and supportive with regard to mental health impairment, it is unlikely that someone will easily and willingly step forth to ask for their rights under the Americans with Disabilities Act. People also have fears about the stigma following them from one employer to the next and how this may affect future employment.

I was considering the work I had done on AIDS stigma and anti-gay sentiment in Jamaica. I saw how the power of stigma

could make people choose death over life because they did not want the mark of being a person living with HIV/AIDS, preferring to go undiagnosed or untreated. That work had also given me the privilege of meeting people who chose to step out of the shadows to educate an ignorant, prejudiced, isolating, and often violent community about life with HIV/AIDS. I also had to deal with the death of one study participant a day before I presented findings to which he had contributed. He was killed because he was out as a gay man, and he knew that was the risk he took, but he had wanted to open the closet doors. I thought about these people and made a choice to not be ashamed of something I had no control over—an illness that was due to a biochemical imbalance, an illness that had upturned my life at home and at work. But of course, not everyone felt as I did.

Impact of Disclosure in the Classroom

Revealing to my students that I have manic depression inspired several of them to talk with me privately about their own mental illnesses. This included one student who was struggling with her own identity around mental illness and who had stopped taking the antidepressants she had been taking for ten years. She was having trouble coping with the resulting depression, but felt "weak" for needing medications to function healthily. As she stated in an e-mail:

"I just wanted to thank you again for talking with me and following up. It was hard for me to actually sit down and talk to you about it because this is something that I have tried to hide and be "strong" about for so long, but you were so incredibly wonderful. Telling myself that I don't need my medication or trying to prove to myself that I am stronger has only dragged me down. I know this is a constant battle that I will have to deal with for the rest of my life, thank you for not tiptoeing around it like everyone else has seemed to."

This student later told me that my willingness to put myself out there inspired her to rethink her own stigmatized position. I was later able to convince her to go to the counseling center, which later led to her restarting her medications.

Since then, other students have expressed appreciation for my disclosure, which has prompted their own admissions of mental illness. They have admitted to feeling relieved that someone

understands because of the difficulty, shame, and embarrassment they feel when explaining their experiences to family and friends. My disclosure has also motivated students to seek help, as I was a living example to them that they really could be functional if they sought treatment. It also helped to de-stigmatize their position. Another student was concerned about completing her assignments after her own hospitalization. She was embarrassed about what she saw as her inability to cope, and felt that no one understood her situation. I told her that I too had been hospitalized for a mental illness and that I understood how it felt to feel stigmatized, by myself and by others. In response, she sent the following e-mail:

"It is really nice to have someone who understands the situation... nobody else (friends, family) seems to, and that makes me ashamed and embarrassed to talk about it. It is really refreshing to finally hear someone say, 'I understand.'"

Yet another student, who was struggling with the emotional and psychological fallout from a long hospitalization during her adolescence, including resistance to taking her currently prescribed medications, stated it this way:

"So I don't know how I am supposed to get over this since I can't talk about it. I really respect you and your ability to be so matter of fact about yourself in the hospital because it is so hard for me to accept and understand my own experience. I don't have any negative judgments about you or see you as any less of a person for going to the hospital, yet I am very critical of myself and see myself as bad and crazy."

Contextualizing Disclosure of Mental Illness in the Classroom

Searches of the main mental health-related databases found little on the topic of disclosure of mental illness in the classroom or other settings, but there is a growing body of literature on disclosure of minority sexual orientation status, so this literature will be used as a framework for considering the issues related to mental illness in similar contexts. Corrigan and Matthews (2003) also suggest that the same tensions and experiences with coming out may serve as a model for people with mental illness experiencing the same issues.

Despite the positive impact my disclosure may have had on some students, there are some in the field who argue that "crossing professional boundaries" was unprofessional in the context of a student in field placement, and it should cause a student to fail the practice component of their social work degree program (Furness & Gilligan, 2004). They also state that many students entering field placements have personal histories or current problems that may have an indirect impact on practice and thus requires "a particularly informed and sensitive response from their practice teacher or the provision of relevant resources" (Furness & Gilligan, 2004, p. 8[?]). In exercises conducted with students in which they were asked to explore the implications of social work students or third parties sharing information on mental health problems and other personal circumstances such as dyslexia and past traumas, there was a general consensus that because we bring to our practice who we are, and we are the instrument of our service," learning to share relevant personal information is part of developing good practice and becoming a competent reflective practitioner" (Furness & Gilligan, 2004, p. 9).

Lastly, Furness and Gilligan (2004) suggest that professionals' credibility with client populations are often enhanced by their disclosure of their experiences that are similar to the client's population. This can be extended to the social work classroom, where expertise on a topic gained through experience may give more legitimacy to the material and bring it to life for students in a way that a more abstract lecture or case study may not be able to accomplish.

Gay students have also experienced problems regarding their disclosure of sexual identity to agency staff and clients and a lack of support for addressing these issues (Messinger, 2004). In an earlier article, the author and her colleague reported on the lack of sensitivity, experience, and knowledge that faculty and administrators also exhibited (Messinger & Topal, 1997). Messinger (2004) found that disclosure of sexual orientation in the placement settings was the most frequently reported issue by participants. This included disclosure to heterosexual clients, staff and field instructors, and homosexual clients. These students also felt that there were professional and ethical reasons for disclosure because they felt that they could have used their

own experience to help their clients.

Homosexual students also felt that their employment may be at risk if they were “out” in the workplace. In one case, a student spoke to her supervisor and decided that she was not yet ready to be “that out.” The individual issues that students reported were managing disclosure of sexual orientation, pressures associated with hiding one’s sexual orientation, and professionalism as a homosexual clinician (Messinger, 2004). As a stigmatized group in the broader society, this example could serve as a model for how members of other marginalized groups within the social work profession negotiate their professional space.

Cramer (1997) found that students had a positive overall response to their professor’s disclosure of being a lesbian “after trust and respect have been built between herself and the students, after they have come to know her as an instructor and a person, and when she is not simply meeting her own personal needs.” They argue that disclosure by a stranger may not have the same positive influence. Furthermore, they saw that educating students about homosexuals was work that required a lot of mental energy, and that the instructor must be willing to risk the disapproval of students and the social work program’s administration, and recommends that one weigh the pros and cons of disclosure (Corrigan & Matthews, 2003; Cramer, 1997) and to be prepared for the pain and vulnerability that may be a consequence (Cramer, 1997). The conditions that Cramer (1997) laid out for disclosure includes an examination of one’s motives, which should be focused on student learning, student readiness, and instructor vulnerability, the degree of openness and timing of the disclosure, with the goal of “conscious use of the professional self” that can be modeled through self-disclosure that respects students’ diverse perspectives and allows students to explore their feelings related to the disclosure.

In my situation, students had me as their instructor for at least two classes and up to four classes prior to my disclosure. However, because of the casual nature of my disclosure, which was appropriate to the context, there was no room given for students to process the information. And given that some students had already perceived some degree of impairment, not having them process their reactions to the disclosure was a lost opportu-

nity for them to ask questions and work through any anxieties they may have about my competence in the classroom and as an academic advisor.

I strongly believe that the classroom is a place for personal disclosure from the teacher and that this helps to de-stigmatize mental illness. Modeling openness about mental illness and incorporating it into my teaching was and is a good thing. As teachers and trainers of mental health professionals, we have, I contend, an explicit responsibility to not reinforce the stigma that is attached to many of our clients. In summarizing the literature in this area, Corrigan and Matthews (2003) found that contact is a much more effective way to reduce stigma than knowledge. It is also a way to demolish the barrier of "us" and "them" which keeps our clients at a distance and often makes some clients reluctant to engage in treatment because they feel disconnected from their practitioner, who they may believe has no idea what it is like to be "them."

Corrigan and Matthews (2003) could find no literature (nor could I) on identity development on people with mental illness, and yet it is this very identity that is stigmatized. They propose a stage model of identity development, which is based on the identity models developed for homosexuality. Although there is no room for a major discussion of their model, the first two stages called *identity confusion* and *comparison* involve the questioning of one's sanity and then feeling alienation from "normal" people. The third stage, *identity acceptance*, is when people feel most comfortable in disclosing. The last is *identity synthesis*, when being mentally ill becomes only one aspect of the individual's identity. Corrigan and Matthews (2003) articulate several levels of disclosure, including social avoidance (from those who are not mentally ill), selective disclosure, and indiscriminant disclosure, the latter being the choice to abandon the secrecy.

Yet disclosure of my mental illness to students became problematic in my work environment. One colleague felt it was a burden I need not share with students, as they would feel the need to take care of me. But no student seemed to have that need; at least no one ever expressed it to me. From the official stance, however, the reality of my mental illness was something that was to be minimized into non-existence.

It had been hard to see my course evaluations drop and hear

about complaints from students to my superiors about my performance and behavior while I was symptomatic. Not being able to address the situation directly or explain it was very frustrating. There is no mention of my illness or hospitalization in my annual professional review. So as a freestanding document, my lower-than-expected teaching performance is not contextualized. Still, thanks to my manic productivity, I had enough publications to get an "above expectation" evaluation for the research aspect of my review.

As an instructor of race and ethnic issues, my identity as a Canadian of Afro-Caribbean descent is something I use in my class to illustrate various points. Why should I not do the same with manic depression? Was it any scarier than being black in America? Or was it that I could not hide my blackness but I could hide my mental illness? If I could hide my blackness, would I be expected to do so as well? Women teaching gender studies use their positions as evidence of expertise on women's experience. Why not in mental health?

Disclosure or Not

Secrecy is prompted by several factors that include negative community attitudes toward mental illness, personal and family attitudes, legislation (such as the Americans with Disabilities Act) and employer and co-worker attitudes (Allen & Carlson, 2003). In the case of the latter, many employers are concerned about lost time and productivity, legal constraints, and how much "control" one has over their disability. The Australian study found that the most frequently mentioned issues by persons with a variety of disabilities were concerns of: 1) "concealment," with issues of self-esteem and negative employer attitudes, and a cultural norm not to complain being some of the sub-themes; 2) protection of self-concept as disabled; 3) whether the condition is a socially less-acceptable condition; 4) avoiding the negative reactions of others; and, 5) whether the stereotyped condition is associated with reduced productivity or increased costs (p. 10). Corrigan and Matthews (2003) suggest another benefit of disclosure is the reduction of stress that results from letting go of a closely guarded secret. Reasons for participants in the study to disclose were: 1) to obtain assistance from a social network such as from an employer or social support system; 2) to access work entitlements or

options; 3) to ascertain whether the condition is considered to be manageable in the workplace; 4) to explain a gap in employment; 5) to determine whether the person has a strong personal preference for honesty; and 6) to see if a public record exists (p. 10). Most of the reasons for concealment are related to the stigma of mental illness and its impact on one's own self-esteem, whether through their own perceptions of themselves or how others perceive them.

Although disclosure of one's own mental illness to a client is deemed by some to be "unprofessional," the Code of Ethics (NASW, 2006) states that social workers should advocate for changes that promote social justice; this article is written with that in mind, from both an etic and an emic perspective. Would it be unprofessional for a doctor to reveal her own diabetes to a patient with the same illness? I don't think so. In the treatment or teaching of addiction, it is considered useful, and even advantageous, to have survived one's own battle with addiction, and counselors in treatment programs are open about their own journey to being, and staying, sober (Culbreth, 2000). So why is it not the same when treating or teaching about mental illness? Although we are not yet at the point where people will walk onto a talk show and announce their mental stability after years of madness and get the cheers that one receives from noting 30 days (or 30 years) of sobriety, the story I tell now is written in the hope that there will be such a day.

With regard to my performance, what was perceived by my superiors as a "performance" issue was for me a "manic depression" issue, although administratively they may appear to be one and the same. But being held professionally responsible for behavior I could not control was more than a little frustrating. Because of my disastrous fall quarter and medical leave in the winter quarter, I lost one year in my rank for tenure. There were other professional consequences, which represented to me the loss of control and the general pattern of loss that is a result of mental illness. My experience reinforced the need for more of us mental health professionals to come out of the darkness. It also made clear why we stay hidden: The costs of exposure just may be too high, especially in the professional context. But our unique position to be on both sides of the fence provides a foundation for program develop-

ment, sensitization, and as a testimonial to remove stigma. Furthermore, students have a living example of a "functional" mentally ill individual, while their own educational and professional experiences often limit their view to those in crisis or those with minimal social and economic functioning.

The more disclosure becomes the norm in academia, the more our academic institutions can develop policies that respond to the unique experiences that each employer with a mental illness may present. Our institutions and other faculty who are mentally ill should also become knowledgeable about their rights under the Americans with Disabilities Act and their institution's human resource policies with regards to medical leaves. Also, health insurance coverage that provides equal coverage to mental health treatment as physical health treatment is one way of assuring that people with mental illness not only have access to treatment, but also are not singled out for "different" coverage.

Outside of academia, Ellison, Russinova, MacDonald-Wilson, and Lyass (2003) found that 87% of their national, non-representative, purposive sub-sample of 350 managers and professionals had disclosed their mental illness in the workplace and this varied by occupational setting, with one third of the respondents disclosing at the time they were applying for the job. Forty percent of the sample worked in mental health services, 22% were employed in health and social services, and 38% worked in business, technical, and educational fields. Sixty-eight percent of this sub-sample had some college experience, with 33% having masters' degrees and 14% having doctoral diplomas. Of the 133 people employed in mental health fields, 95% of the 133 respondents had disclosed, compared to 81% in health and social services, and 87% in technical/business/educational settings.

With regard to the circumstances of the disclosure, more than half of the sample reported a negative circumstance that led to disclosure. Among other reasons, about a third had to explain symptoms, and 20% experienced a hospitalization while employed. In the context of this paper, it is important to note that 32% disclosed when they felt employment was secure, and 29% disclosed when they felt it would not lead to negative consequences. Among the 47 participants who did not disclose, fear of negative work evaluations or missed promotions were the reasons given by

almost all of them. This study demonstrates the feelings of fear that people with mental illnesses experience with regard to disclosure in the workplace, and yet it also shows that people do want to disclose despite the stigma.

Disclosure to students makes it easier for them to understand that the mentally ill are all around us, that we are not to be feared, that treatment can work, and that career and success in life are indeed possible. Disclosure “normalizes” mental illness. When I disclosed in class, it was because I was in a moment of using an “us/them” dichotomy, which was a struggle for me to play out one more time. I was “them” and I was “us” at the same time. I suppose I could have found a mentally ill person to drop in for the one minute of that class that I disclosed—that is, I could have had another “model”—but there I was, a live sample. And it was but a 30-second part of a longer statement. But it was enough to make a difference in my life as a professor: I felt so free and real; and my students got to see me as human and got to learn what the mentally ill look like outside of the institutions in which they are often treated.

After Disclosure

When one is mentally ill, it is not known how long each period of sanity will last. And others around us are aware of this. Disclosure of one’s mental illness may result in a lessening of trust in one’s competence to function in a wide variety of spheres, and the vulnerability of that position is reason enough to keep it secret. Even as professionals we tiptoe and avoid naming mental illness—as if saying the words will be an incantation that conjures up its scary head. Owning my manic depression now comes easy to me, as I have owned it in both regional and national forums. For me, the personal is now political. As a mentally ill social work professional and educator, it is my ethical responsibility to hide no more, and to advocate and write about the stigma and discrimination I and other mentally ill people have experienced, so that my daughter will not have to feel the stigma carried by her mother.

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¹ To protect the privacy of students, they will not be named or otherwise identified, but they gave written permission for their e-mails to be used in this paper.

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